

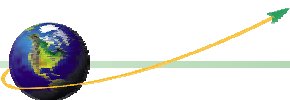


Travel & Tourism in New Jersey

A Report on the 2001 Travel Year

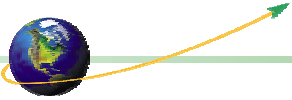
May, 2002

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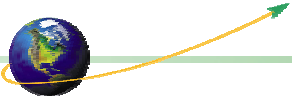
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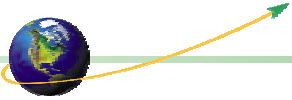
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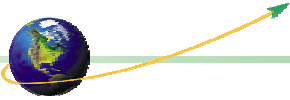
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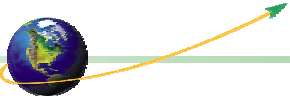
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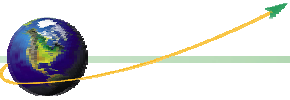
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Background



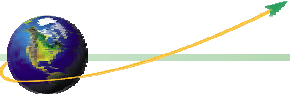
- ◉ This report describes research conducted by Longwoods International on behalf of the New Jersey Office of Travel and Tourism for the 2001 travel year.
- ◉ Conducted annually since 1991, the New Jersey Research Program:
 - ◉ *provides monitoring and tracking data for the state's tourism industry*
 - ◉ *establishes the economic impacts of tourism in New Jersey*
 - ◉ *provides input into the state's tourism marketing strategy*
 - ◉ *tracks awareness and impacts of New Jersey's tourism advertising*
 - ◉ *provides accountability in terms of the trips generated by advertising and the return the state receives on its investment in tourism promotion.*

The Research



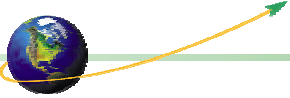
- ◉ The research program begins with Longwoods' **TRAVEL USA®** Monitor, which surveys the travel patterns of 200,000 U.S. households annually.
- ◉ In addition to **TRAVEL USA®**, the research program for the 2001 travel year included:
 - ◉ *a survey of the New Jersey day trip market*
 - ◉ *a survey of overnight visitors to New Jersey*
 - ◉ *an advertising benchmark study*
 - ◉ *an advertising conversion study, and*
 - ◉ *an inventory of the New Jersey accommodations industry.*
- ◉ An overview of the research method for the various studies conducted is presented in Appendix I.

The Research



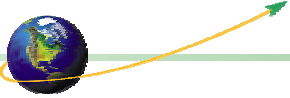
- ◉ The Longwoods segmentation model identifies 12 types of pleasure trips and 3 types of business trips, allowing the program to focus on trips of specific interest to New Jersey, such as: casino trips, beach trips, touring trips, and special event trips.
- ◉ To provide annual documentation of the impacts of tourism on New Jersey's economy, Longwoods has retained Dr. James M. Rovelstad of Rovelstad & Associates.
- ◉ Visitor expenditure estimates serve as inputs into an economic input/output model for the state.

This Report



- ⊙ This report summarizes the main findings of the research program.
- ⊙ It is organized into four sections:
 - ⊙ *Key New Jersey Travel and Tourism Facts: a compendium of facts about New Jersey's Travel and Tourism industry, organized for quick and easy reference*
 - ⊙ *New Jersey's Pleasure Travel Market: demographic profile of the New Jersey overnight pleasure trip vs. that of the U.S. norm*
 - ⊙ *New Jersey's Image and Product Delivery, and*
 - ⊙ *Impact of the state's advertising.*

This Report

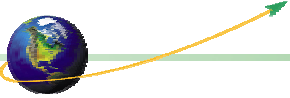


- ◉ In order to make results for the 2001 travel year available as quickly as possible, some 4th quarter data on economic impacts are estimated; our 2002 report will update any significant changes in the results.



Key New Jersey Travel and Tourism Facts

Size of New Jersey's Travel Market* in 2001

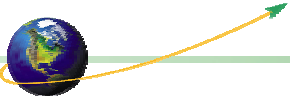


	Estimated Trips (Millions)
DAY TRIPS	
Business	9.4
Pleasure	<u>112.1</u>
Total	121.5
OVERNIGHT TRIPS	
Business	7.0
Pleasure	<u>37.6</u>
Total	44.6
DAY AND OVERNIGHT TRIPS	
Business	16.4
Pleasure	<u>149.7</u>
Total	166.1

* Estimated person trips by adults 18+ who are residents of the U.S. excluding Alaska and Hawaii. A "trip" is defined as any trip "outside your own community that is not part of your normal routine".

Source: Longwoods International

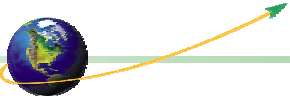
New Jersey's Travel Market By Region in 2001



REGION	<u>Estimated Overnight Trips</u> (Millions)	<u>Estimated Day Trips</u> (Millions)	<u>Estimated Total Trips</u> (Millions)
Skylands	4.7	10.3	15.0
Atlantic County	17.9	34.7	52.6
Southern Shore	5.0	14.3	19.3
Delaware River	3.3	15.0	18.3
Shore Region	6.0	25.9	31.9
Gateway Region	7.7	21.2	28.9
TOTAL SHORE REGIONS	28.9	74.9	103.8
TOTAL	44.6	121.5	166.1

Source: Longwoods International

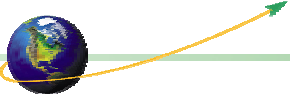
2001 Travel and Tourism Expenditures



Total 2001 Expenditures = \$31.0 Billion

<u>TOTAL EXPENDITURES BY:</u>	<u>\$ Billions</u>	<u>%</u>
TYPE OF TRIP		
Day Trips	8.8	28
Overnight Trips	20.3	65
Pass Through	1.9	7
SECTOR		
Restaurant	9.1	29
Retail	6.6	21
Gaming	4.2	13
Automobile	4.0	13
Lodging	4.4	14
Recreation	2.5	8
Local Transportation	0.3	1
PLACE OF RESIDENCE		
New Jersey	4.7	15
Other States	26.3	85

2001 Travel and Tourism Per Person Expenditures



Total 2001 Expenditures = \$31.0 Billion

<u>PER PERSON* EXPENDITURES</u>	<u>Entire Trip</u>	<u>Per Day**</u>
Day Trips	\$86	\$86
Overnight Trips	\$460	\$154
Day and Overnight Trips	\$187	\$122

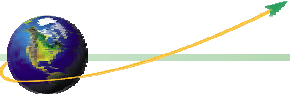
* Per adult member of the travel party

** Average length of stay was 3.0 nights on overnight trips

4th quarter data estimated

Source: Rovelstad & Associates, Longwoods International

2001 Economic Impact of Travel and Tourism



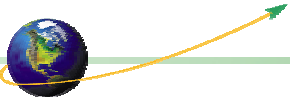
TOTAL EXPENDITURES (\$ BILLIONS)	31.0
EMPLOYMENT (Thousands)	
Direct	490
Indirect	<u>346</u>
Total*	836
PAYROLL (\$ Billions)	
Direct	8,646
Indirect	<u>9,015</u>
Total*	17,661
STATE TAXES (\$ Billions)	
Direct	2,181
Indirect	<u>1,649</u>
Total*	3,830
LOCAL TAXES (\$ Billions)	
Direct	311
Indirect	<u>1,558</u>
Total*	1,869

* Columns may not sum due to rounding

4th quarter data estimated

Source: Rovelstad & Associates, Longwoods International

2001 Economic Impact By Region



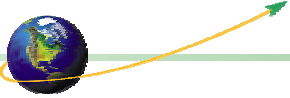
	<u>Delaware</u>	<u>Gateway</u>	<u>Greater Atlantic</u>	<u>Shore</u>	<u>Southern Shore</u>	<u>Skylands</u>
EXPENDITURES**						
\$ Billions	3.3	8.0	8.9	3.9	3.8	3.1
% of State Total	11	26	29	13	12	10
EMPLOYMENT*						
Thousands	106	234	171	117	128	80
% of State Total	13	28	20	14	15	10
PAYROLL*						
\$ Billions	2.1	5.3	4.7	2.0	1.9	1.7
% of State Total	12	30	26	11	11	10
STATE TAXES*						
\$ Millions	409	1,014	1,154	457	451	345
% of State Total	11	26	30	12	12	9
LOCAL TAXES*						
\$ Millions	219	523	536	216	208	167
% of State Total	12	28	29	12	11	9

* Includes direct and indirect impacts

** 4th quarter data estimated

Source: Rovelstad & Associates, Longwoods International

Economic Impact of Travel and Tourism – 1994 to 2001



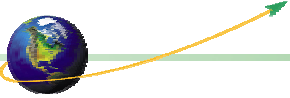
	<u>1994</u>	<u>1995</u>	<u>1996</u>	<u>1997</u>	<u>1998*</u>	<u>1999</u>	<u>2000</u>	<u>2001**</u>
Expenditures (\$ Billions)	22.8	23.4	24.0	25.6	26.0	28.2	30.8	31.0
Employment (Thousands)								
Direct	384	390	403	400	408	473	487	490
Indirect	184	185	181	223	228	314	345	346
Total	569	576	584	623	635	787	832	836
Payroll (\$ Billions)								
Direct	6.1	6.2	6.6	6.7	6.8	8.1	8.5	8.6
Indirect	4.2	4.3	4.3	6.2	6.4	8.5	8.9	9.0
Total	10.3	10.5	11.0	12.9	13.2	16.6	17.4	17.6
State Taxes (\$ Billions)	2.5	2.6	2.9	3.2	3.2	3.6	3.8	3.8
Local Taxes (\$ Billions)	1.1	1.2	1.2	1.5	1.5	1.8	1.8	1.9
Total Taxes (\$ Billions)	3.6	3.8	4.1	4.6	4.7	5.4	5.6	5.7

* Since the economic input/output model was not run in 1998, impacts other than expenditures are estimated

** 4th quarter data estimated

Source: Rovelstad & Associates, Longwoods International

Travel and Tourism Expenditures 2000 vs. 2001

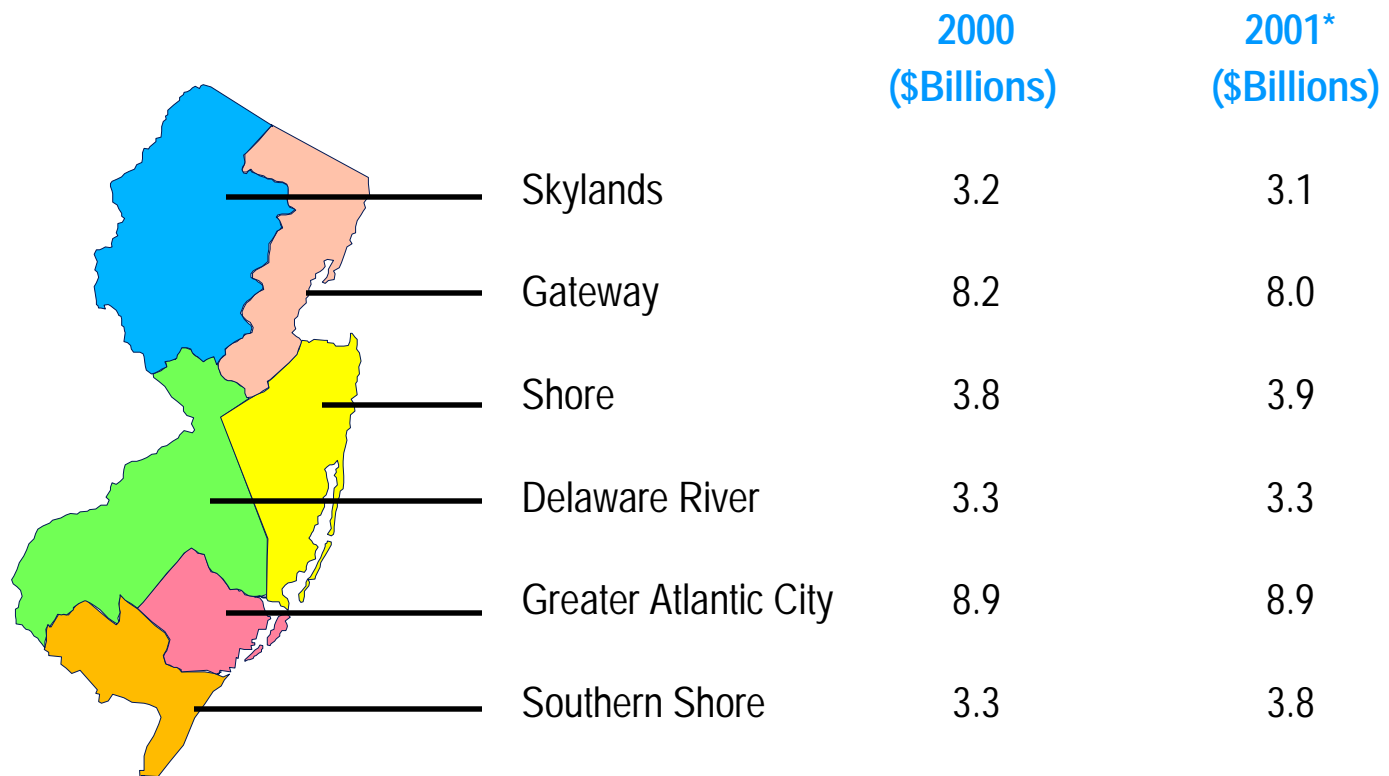
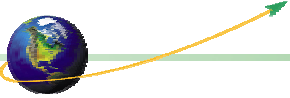


	<u>2000</u>	<u>2001*</u>	<u>% Change</u>
TOTAL (\$ Billions)	30.8	31.0	+1
BY TYPE OF TRIP (\$ Billions)			
Day Trip	8.75	8.59	-2
Overnight Trip	20.14	20.55	+2
Pass Through	1.89	1.89	-
BY SECTOR (\$ Billions)			
Restaurant	9.06	9.10	-
Retail	6.58	6.59	-
Gaming	4.22	4.19	-1
Automobile	4.02	4.03	-
Lodging	4.13	4.37	+6
Recreation	2.48	2.47	-
Local Transportation	0.28	0.28	-
PER TRAVELER (\$'s)			
Day Trips	\$70	\$71	+1
Overnight Trips	\$458	\$460	-

* 4th quarter data estimated

Source: Rovelstad & Associates, Longwoods International

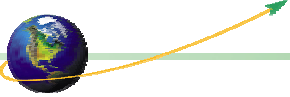
Regional Travel Expenditures 2000 vs. 2001



* 4th quarter estimated

Source: Rovelstad & Associates, Longwoods International

2001 Travel and Tourism Expenditures – By County



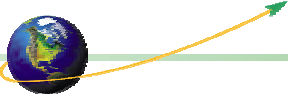
	<u>Total</u>	<u>Gaming</u>	<u>Restaurant</u>	<u>Retail</u>	<u>Lodging</u>	<u>Automobile</u>	<u>Recreation</u>	<u>Local Transportation</u>
	(\$ Billions)	(\$ Billions)	(\$ Millions)	(\$ Millions)	(\$ Millions)	(\$ Millions)	(\$ Millions)	(\$ Millions)
Atlantic	8.89	4.19	1,532	982	933	747	448	59
Bergen	2.07		754	532	268	319	171	24
Burlington	1.05		372	289	106	167	110	11
Camden	0.87		327	260	61	135	82	9
Cape May	3.64		1,006	675	1,183	449	303	30
Cumberland	0.18		71	55	11	27	14	2
Essex	1.60		596	428	185	246	131	18
Gloucester	0.36		138	108	23	56	33	3
Hudson	1.19		444	318	135	183	97	13
Hunterdon	0.23		86	60	26	35	19	3
Mercer	0.94		326	257	97	149	98	10
Middlesex	1.61		587	414	209	249	134	19
Monmouth	1.83		601	532	168	289	225	16
Morris	1.57		551	373	250	247	138	19
Ocean	2.06		618	529	395	283	226	14
Passaic	0.61		239	182	41	91	47	6
Salem	0.12		46	35	9	19	12	1
Somerset	0.75		266	184	109	117	64	9
Sussex	0.33		122	81	41	51	29	3
Union	0.96		359	261	102	146	77	11
Warren	0.18		70	47	15	27	16	2

Note: Numbers may not sum to total due to rounding

4th quarter data estimated

Source: Rovelstad & Associates, Longwoods International

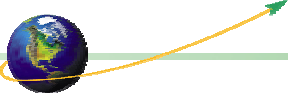
2001 Travel and Tourism Impacts By County



	<u>Jobs</u> (Thousands)	<u>Payroll</u> (\$ Millions)	<u>State Taxes</u> (\$ Millions)	<u>Local Taxes</u> (\$ Millions)
Atlantic	170.7	4653.6	1154.3	536.0
Bergen	56.0	1321.9	263.7	148.8
Burlington	34.0	667.0	128.5	69.8
Camden	28.9	553.1	109.9	61.3
Cape May	121.8	1829.0	429.2	201.2
Cumberland	6.2	95.6	21.8	6.5
Essex	45.4	1097.8	201.9	100.0
Gloucester	12.6	200.1	45.0	20.2
Hudson	34.9	778.5	146.6	57.5
Hunterdon	5.5	110.1	24.5	9.5
Mercer	27.5	588.3	112.5	63.0
Middlesex	50.4	1108.8	203.1	113.9
Monmouth	51.0	1011.9	212.1	106.6
Morris	41.5	958.7	185.0	96.6
Ocean	65.8	1016.2	244.5	109.7
Passaic	19.0	377.5	76.4	38.6
Salem	3.6	55.0	13.6	5.1
Somerset	18.0	398.4	80.7	37.7
Sussex	9.5	146.3	34.4	14.6
Union	28.5	605.9	122.7	64.1
Warren	5.3	87.7	20.0	8.4

Source: Rovelstad & Associates, Longwoods International

2001 Accommodations Inventory And Occupancy – By County



	<u>Hotels/Motels/Resorts</u>		<u>Campgrounds**</u>	
	<u># of Rooms</u>	<u>Occupancy*</u> (%)	<u># of Sites</u>	<u>Occupancy %</u> (%)
Atlantic	20,370	77.71	1,625	49.16****
Bergen	6,999	71.23	--	--
Burlington	4,339	66.16	1,045	49.16****
Camden	2,560	60.29	100	49.16****
Cape May	19,334	73.00	5,689	56.94
Cumberland	710	54.15	14	49.16****
Essex	4,420	72.92	--	--
Gloucester	868	65.91***	298	49.16****
Hudson	3,220	72.04	100	49.16****
Hunterdon	901	56.78	427	52.92**
Mercer	2,642	71.42	20	49.16****
Middlesex	5,766	73.41	53	49.16****
Monmouth	4,490	67.65	182	49.16****
Morris	5,764	72.38	154	49.16****
Ocean	4,511	68.89	1,381	61.60***
Passaic	1,125	67.07	50	49.16****
Salem	511	65.91***	369	49.16****
Somerset	2,788	72.96	--	--
Sussex	983	56.37	1,015	49.16****
Union	2,944	66.53	--	--
Warren	508	70.16***	509	49.16****
State	95,753	71.56	13,031	49.16

* Average weighted by rooms and months open

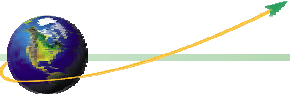
** Includes private and public transient campsites

*** Region average

**** State average

Source: Rovelstad & Associates

Expenditures and Employment – County Ranks

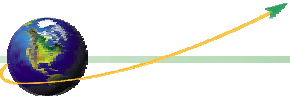


<u>TOTAL EXPENDITURES</u>		
	<u>County</u>	<u>\$ Billions</u>
1)	Atlantic	8.89
2)	Cape May	3.64
3)	Bergen	2.07
4)	Ocean	2.06
5)	Monmouth	1.83
6)	Middlesex	1.61
7)	Essex	1.60
8)	Morris	1.57
9)	Hudson	1.19
10)	Burlington	1.05
11)	Union	0.96
12)	Mercer	0.94
13)	Camden	0.87
14)	Somerset	0.75
15)	Passaic	0.61
16)	Gloucester	0.36
17)	Sussex	0.33
18)	Hunterdon	0.23
19)	Cumberland	0.18
20)	Warren	0.18
21)	Salem	0.12

<u>TOTAL EMPLOYMENT</u>		
	<u>County</u>	<u>Jobs</u> (Thousands)
1)	Atlantic	171
2)	Cape May	122
3)	Ocean	66
4)	Bergen	56
5)	Monmouth	51
6)	Middlesex	50
7)	Essex	45
8)	Morris	42
9)	Hudson	35
10)	Burlington	34
11)	Camden	29
12)	Union	29
13)	Mercer	28
14)	Passaic	19
15)	Somerset	18
16)	Gloucester	13
17)	Sussex	10
18)	Cumberland	6
19)	Hunterdon	6
20)	Warren	5
21)	Salem	4

Source: Rovelstad & Associates, Longwoods International

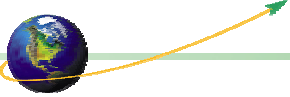
Reasons for Taking a New Jersey Trip – 2001



	<u>OVERNIGHT TRIPS</u>		<u>DAY TRIPS</u>	
	<u>Estimated Millions of Trips</u>	<u>Percent</u>	<u>Estimated Millions of Trips</u>	<u>Percent</u>
PLEASURE TRIPS	37.6	84	112.1	92
Visit Friends/Relatives	15.1	34	39.5	32
Casino	12.2	27	28.3	23
Beach	4.3	10	18.5	15
Touring	1.7	4	3.3	3
Special Event	1.3	3	2.6	2
Business/Pleasure	0.9	2	--	--
City	0.7	2	1.0	1
Outdoors	0.5	1	3.3	3
Country Resort	0.2	1	0.2	<1
Theme Park	0.2	<1	2.9	2
Cruise	0.2	<1	0.4	<1
Ski	0.2	<1	0.7	1
Shopping	--	--	11.6	10
BUSINESS TRIPS	7.1	16	9.4	8

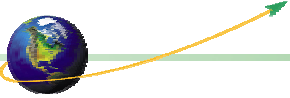
Source: Longwoods International

Reasons for Taking a New Jersey Overnight Trip – 1994 to 2001



	<u>1994</u> (Millions)	<u>1995</u> (Millions)	<u>1996</u> (Millions)	<u>1997</u> (Millions)	<u>1998</u> (Millions)	<u>1999</u> (Millions)	<u>2000</u> (Millions)	<u>2001</u> (Millions)
PLEASURE TRIPS	30.5	30.8	30.8	34.6	34.0	37.8	37.4	37.6
Visit Friends/Relatives	13.0	13.6	13.1	15.3	14.3	15.1	15.7	15.1
Casino	7.4	7.4	7.7	9.3	9.6	12.1	11.2	12.2
Beach	4.2	3.9	4.0	4.0	4.5	3.7	4.1	4.3
Special Event	1.7	1.4	1.5	1.7	1.3	1.9	1.8	1.3
Touring	1.5	1.3	1.2	1.4	1.3	1.7	1.4	1.7
Business/Pleasure	0.8	1.1	1.2	1.0	1.1	1.0	1.0	0.9
Outdoor	0.8	1.1	0.8	0.8	0.5	0.6	0.5	0.5
City	0.6	0.4	0.3	0.5	0.5	0.9	0.7	0.7
Theme Park	0.3	0.3	0.3	0.3	0.5	0.3	0.4	0.2
Country Resort	0.2	0.2	0.4	0.1	0.3	0.2	0.3	0.2
Ski	0.1	0.1	0.1	<0.1	0.1	0.1	0.1	0.2
Cruise	0.1	<0.1	0.1	0.1	<0.1	0.1	0.2	0.2
BUSINESS TRIPS	5.3	5.3	6.5	6.2	6.0	6.0	6.6	7.1

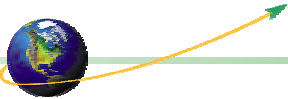
Reasons for Taking a New Jersey Day Trip – 1994 to 2001



	<u>1994</u> (Millions)	<u>1995</u> (Millions)	<u>1996</u> (Millions)	<u>1997</u> (Millions)	<u>1998</u> (Millions)	<u>1999</u> (Millions)	<u>2000</u> (Millions)	<u>2001</u> (Millions)
PLEASURE TRIPS	129.0	116.7	114.6	107.5	110.7	114.6	117.5	112.1
Visit Friends/Relatives	55.9	50.4	40.9	35.8	39.7	36.9	39.6	39.5
Casino	28.4	24.8	31.1	25.3	26.6	22.3	25.9	28.3
Beach	13.3	14.9	12.4	14.4	13.9	13.5	16.4	18.5
Special Event	11.4	5.0	5.9	6.6	5.7	4.0	2.6	2.6
Touring	2.3	5.1	5.0	7.8	7.7	7.0	6.0	3.3
Outdoor	6.2	5.3	13.1	6.4	9.4	7.8	5.9	3.3
City	5.6	4.9	1.5	5.5	2.8	3.2	1.9	1.0
Theme Park	3.4	3.0	2.8	3.8	3.1	3.7	3.1	2.9
Country Resort	0.6	2.4	1.0	0.5	0.8	1.7	1.6	0.2
Ski	0.6	0.3	0.9	1.2	0.7	0.5	0.1	0.7
Cruise	1.1	0.6	< 0.1	0.1	0.2	0.3	0.3	0.4
Shopping	N/A	N/A	N/A	N/A	N/A	13.7	14.0	11.6
BUSINESS TRIPS	7.8	10.4	19.5	12.6	12.9	8.5	7.9	9.4

Source: Longwoods International

National Travel and Tourism Trends



	<u>1994</u>	<u>1995</u>	<u>1996</u>	<u>1997</u>	<u>1998</u>	<u>1999</u>	<u>2000</u>	<u>2001</u>
Overnight Trips* (Billions)	1.185	1.177	1.235	1.375	1.448	1.478	1.493	1.458
Overnight Business Trips* (Billions)	0.253	0.236	0.260	0.286	0.315	0.324	0.324	0.291
Overnight Pleasure Trips* (Billions)	0.932	0.940	0.975	1.089	1.133	1.153	1.169	1.167
Estimated Overnight Casino Trips*** (Millions)	37	40	44	52	54	66	70	74
Average Daily Per Person Expenditures**	\$51	\$53	\$58	\$58	\$65	\$76	\$72	\$75
Average Nights Away	5.1	5.3	5.1	4.8	4.7	4.9	5.2	5.0
Pleasure Trips	5.0	5.3	5.4	4.9	4.8	5.0	5.6	5.0
Business Trips	5.4	5.2	3.9	4.3	4.3	4.2	3.7	4.9
Use of Pre-Paid Packages	12%	10%	10%	6%	6%	10%	9%	12%
Use of Travel Agents								
For Trip Planning	17%	16%	15%	17%	16%	15%	13%	12%
To Book All/Part of Trip	18%	18%	17%	18%	16%	16%	15%	12%
Use of the Internet								
For Trip Planning	N/A	N/A	2%	6%	11%	14%	22%	23%
To Book All/Part of Trip	N/A	N/A	N/A	N/A	N/A	10%	16%	18%
Participation in Types of Tourism								
Historic	N/A	N/A	N/A	13%	15%	18%	16%	16%
Cultural	N/A	N/A	N/A	11%	9%	11%	9%	9%
Eco-tourism	N/A	N/A	N/A	8%	6%	7%	8%	7%

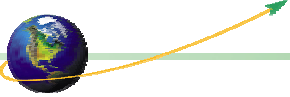
* Trips by adults 18+

** Per adult members of party, does not include travelers on a pre-paid package

*** Trips for which casino gaming was the main purpose

Source: Longwoods International

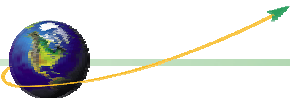
New Jersey's Competitive Position in the U.S. Overnight Market



	<u>Rank*</u>							
	<u>1994</u>	<u>1995</u>	<u>1996</u>	<u>1997</u>	<u>1998</u>	<u>1999</u>	<u>2000</u>	<u>2001</u>
PLEASURE TRIPS	13	10	12	13	13	13	10	10
Visit Friends/Relatives	16	15	17	15	18	15	16	17
Casino	2	2	2	2	2	2	2	2
Beach	4	4	4	4	4	5	5	5
Special Event	22	29	23	26	31	24	26	29
Touring	38	39	40	39	43	34	42	36
Business/Pleasure	29	18	16	22	24	26	25	24
Outdoor	33	24	33	34	47	42	46	43
City	20	24	30	28	27	25	26	26
Theme Park	13	13	12	16	11	16	13	23
Country Resort	30	36	19	36	25	36	23	31
Ski	29	29	26	46	36	20	23	21
BUSINESS TRIPS	15	20	15	21	23	15	21	17

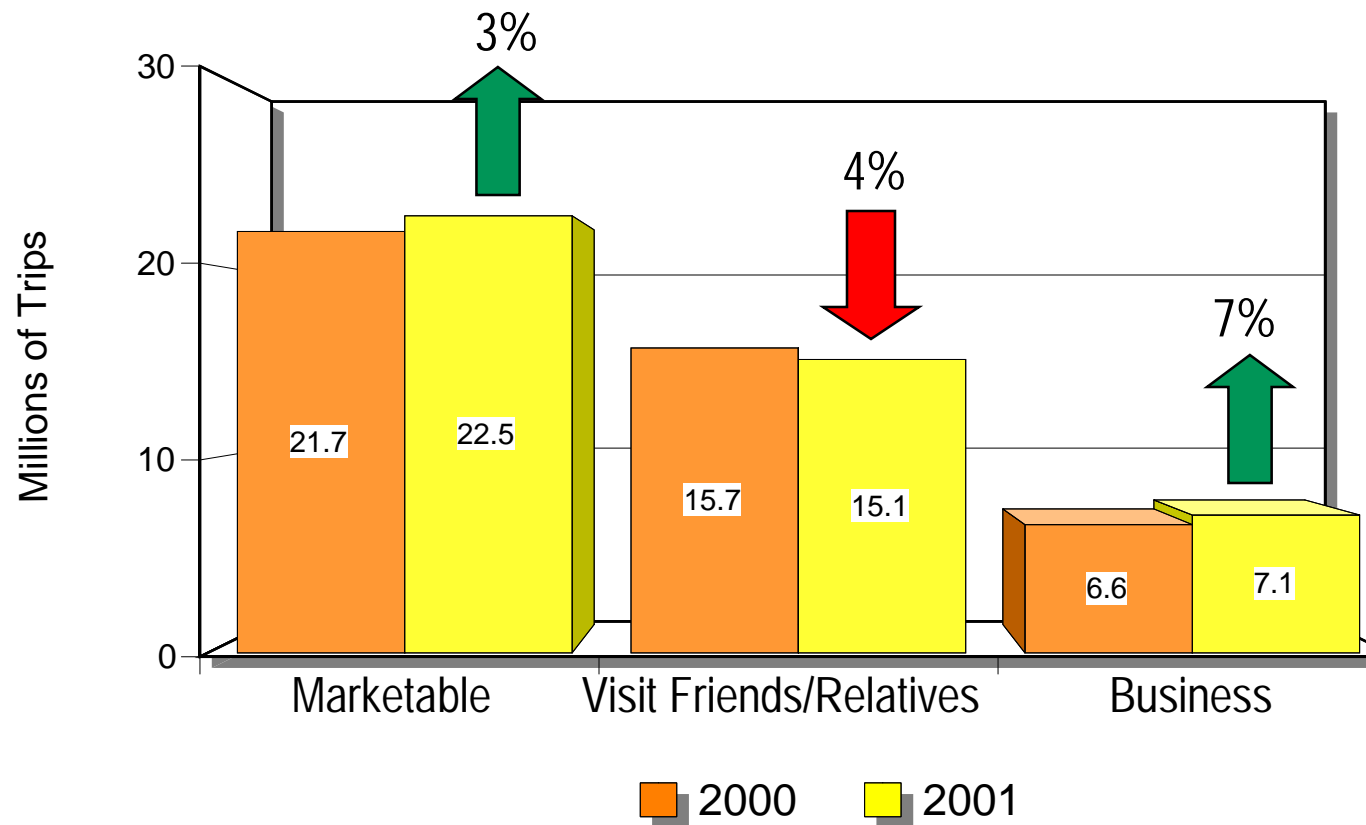
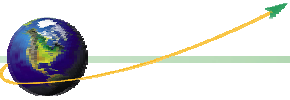
* Rank of overnight trips among 71 U.S. states and foreign destinations evaluated.

New Jersey's Share of the U.S. Overnight Travel Market

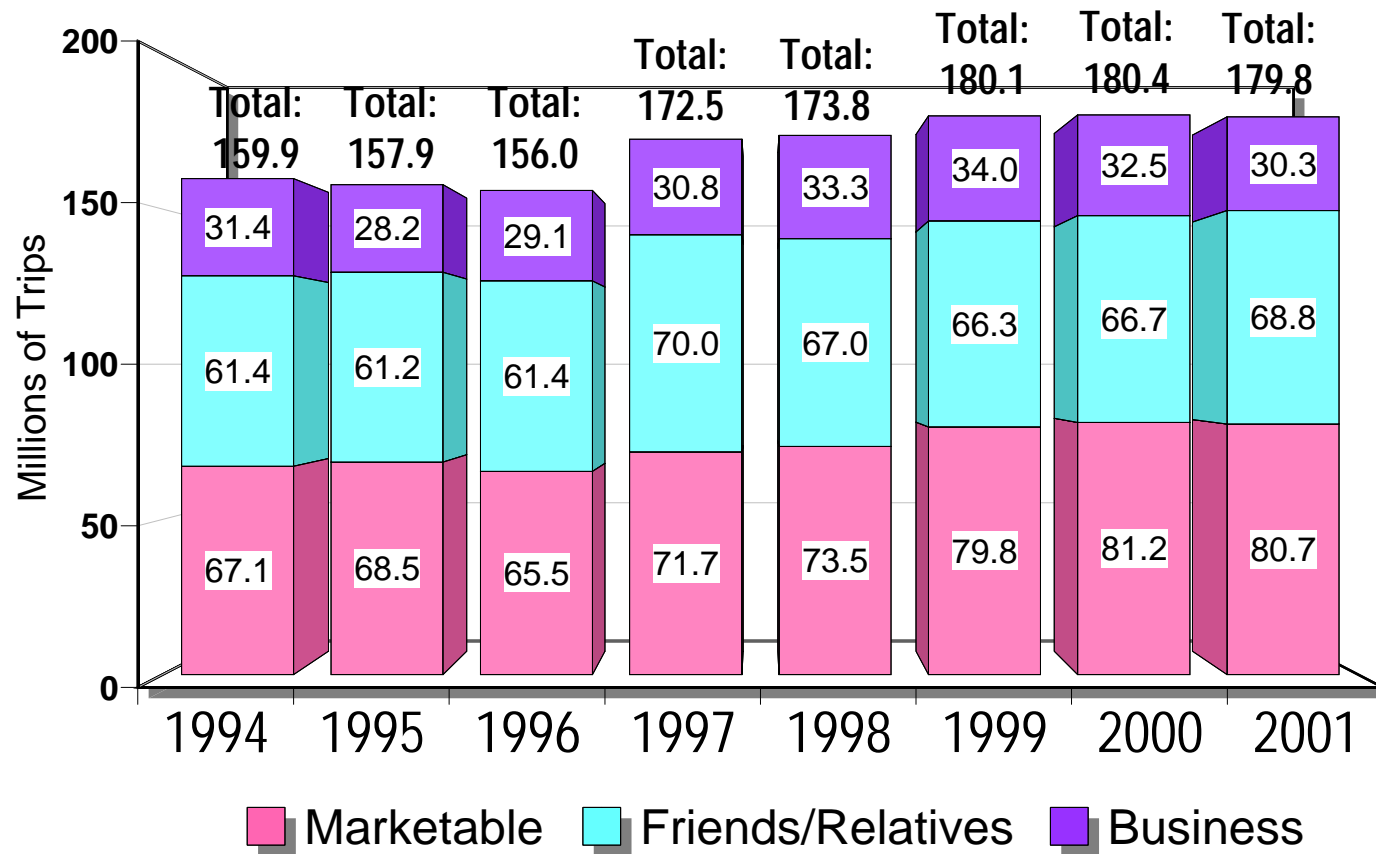
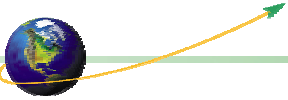


	<u>Market Share (%)</u>							
	<u>1994</u>	<u>1995</u>	<u>1996</u>	<u>1997</u>	<u>1998</u>	<u>1999</u>	<u>2000</u>	<u>2001</u>
PLEASURE TRIPS	3.1	3.3	3.2	3.2	3.0	3.2	3.2	3.2
Visit Friends/Relatives	2.6	2.9	2.6	2.7	2.5	2.6	2.7	2.6
Casino	19.4	18.4	17.4	17.9	17.6	18.4	15.9	16.5
Beach	8.6	8.2	8.2	7.5	7.8	6.2	7.0	7.2
Special Event	2.1	1.7	1.9	2.0	1.4	1.9	1.9	1.4
Touring	1.6	1.5	1.3	1.5	1.3	1.6	1.3	1.6
Business/Pleasure	1.6	2.3	2.4	2.0	1.9	1.8	1.8	2.0
Outdoor	1.0	1.5	1.2	1.0	0.6	0.8	0.7	0.7
City	2.0	1.4	1.1	1.4	1.5	1.8	1.4	1.5
Theme Park	1.4	1.5	1.4	1.0	1.8	1.1	1.4	0.6
Country Resort	1.0	0.9	2.2	0.8	1.6	1.0	1.6	1.3
Ski	0.5	0.7	0.9	0.3	0.7	1.4	1.3	1.5
BUSINESS TRIPS	2.4	2.2	2.5	2.2	1.9	2.5	2.0	2.4

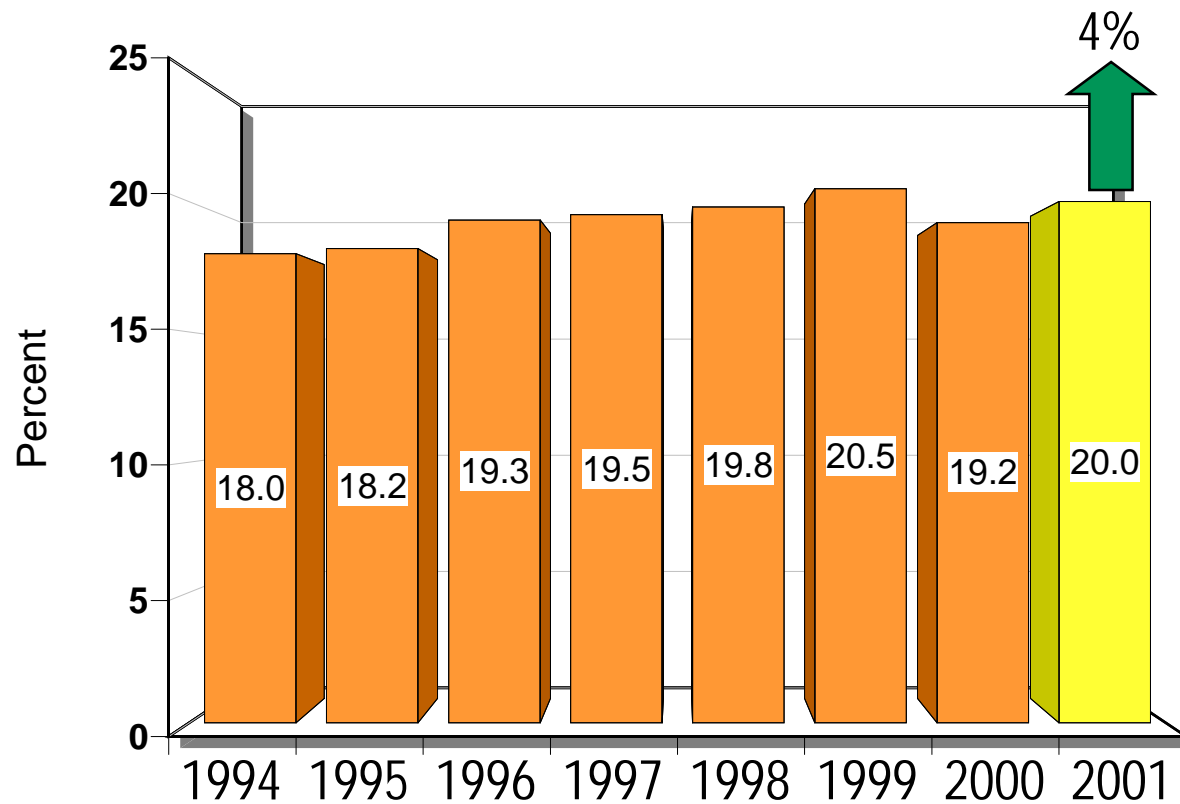
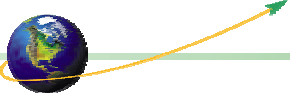
Overnight Trips to New Jersey



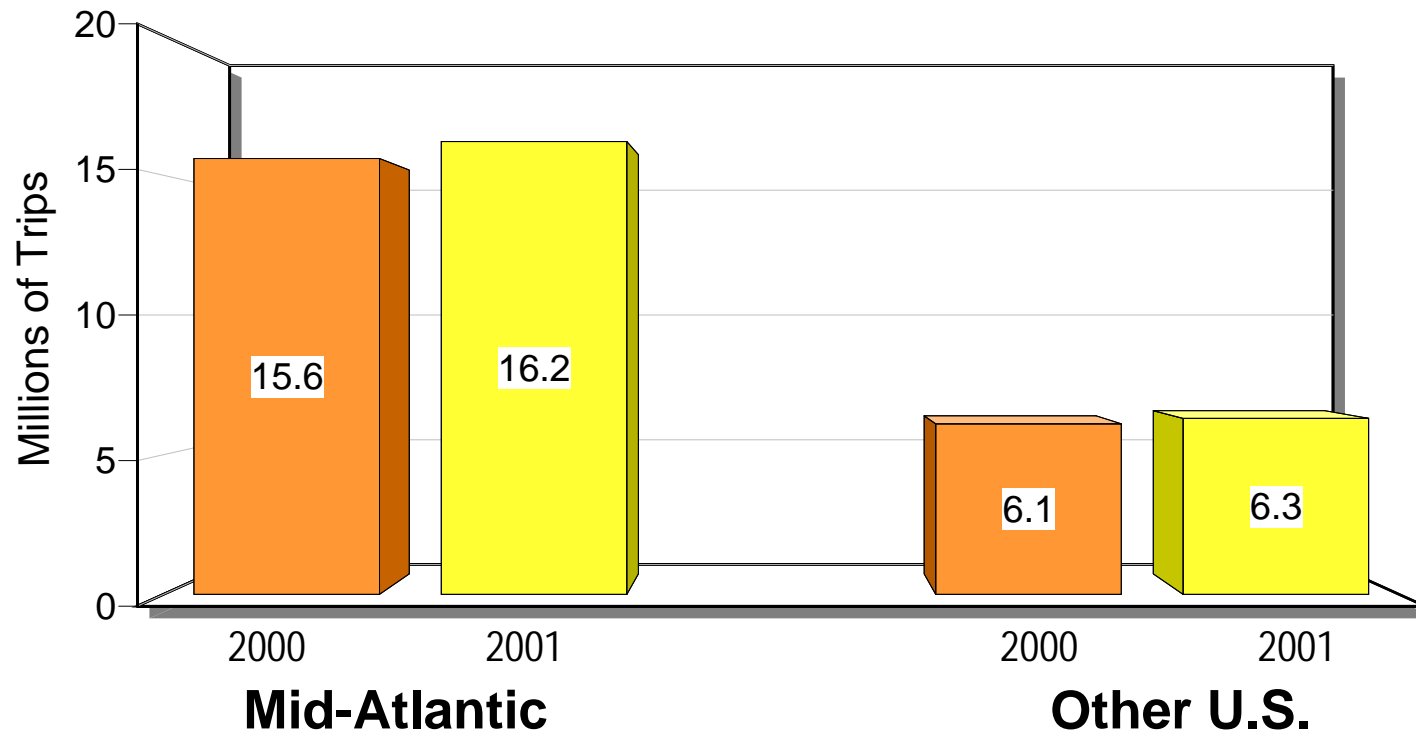
Overnight Trips by Mid-Atlantic Residents



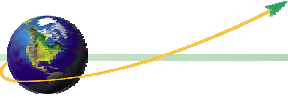
New Jersey's Share of Mid-Atlantic Overnight "Marketable" Leisure Trips



Source of Overnight Marketable Leisure Trips to New Jersey in 2001



New Jersey's Sources of Business in 2001



SOURCES OF OVERNIGHT TRIPS

	<u>Metropolitan</u>	<u>Estimated Millions of Trips</u>	<u>Percent</u>
1)	New York	11.8	27
2)	Philadelphia	9.7	22
3)	Washington, DC	3.5	8
4)	Baltimore	1.5	3
5)	Wilkes Barre-Scranton	1.2	3

U.S. States

1)	Pennsylvania	9.9	22
2)	New York	7.8	17
3)	New Jersey	7.3	16
4)	Maryland	3.3	7
5)	Virginia	2.2	5

SOURCES OF DAY TRIPS

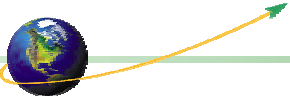
	<u>Metropolitan</u>	<u>Estimated Millions of Trips</u>	<u>Percent</u>
1)	New York	69.9	57
2)	Philadelphia	46.4	38
3)	Washington, D.C.	1.4	1
4)	Baltimore	1.3	1
5)	Hartford-New Haven	0.7	1

U.S. States

1)	New Jersey	40.3	33
2)	Pennsylvania	37.0	30
3)	New York	24.5	20
4)	Virginia	10.2	8
5)	Maryland	3.2	3

* Note: The metropolitan areas of New York and Philadelphia each include part of the state of New Jersey
Source: Longwoods International

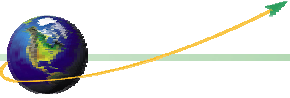
New Jersey's Sources of Overnight Trips 1994 to 2001



<u>Metropolitan</u>	<u>1994</u> (Millions)	<u>1995</u> (Millions)	<u>1996</u> (Millions)	<u>1997</u> (Millions)	<u>1998</u> (Millions)	<u>1999</u> (Millions)	<u>2000</u> (Millions)	<u>2001</u> (Millions)
1) New York	12.1	12.1	13.0	13.7	13.2	12.6	11.9	11.8
2) Philadelphia	6.3	6.8	6.0	7.3	7.5	8.6	8.6	9.7
3) Washington, DC	1.7	1.7	2.0	2.2	2.3	2.5	3.6	3.5
 <u>U.S. States</u>								
1) New Jersey	7.2	7.9	7.6	8.2	8.3	6.7	5.8	7.3
2) New York	7.3	7.5	8.2	8.4	7.4	9.4	9.1	7.8
3) Pennsylvania	6.6	5.9	5.7	7.2	7.4	8.5	9.7	9.9

Note: The metropolitan areas of New York and Philadelphia each included part of the state of New Jersey; a ☐ indicated a statistically reliable increase and a ☐ indicates a statistically reliable decrease versus the previous year in terms of the proportion of all trips to each place

New Jersey's Sources of Day Trips 1994 to 2001

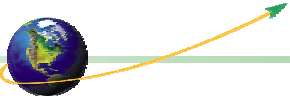


<u>Metropolitan</u>	<u>1994</u>	<u>1995</u>	<u>1996</u>	<u>1997</u>	<u>1998</u>	<u>1999</u>	<u>2000</u>	<u>2001</u>
	(Millions)	(Millions)	(Millions)	(Millions)	(Millions)	(Millions)	(Millions)	(Millions)
1) New York	74.3	79.3	80.7	81.6	86.2	81.6	67.8	69.9
2) Philadelphia	56.2	35.7	43.1	29.8	29.4	36.0	48.6	44.4
3) Washington D.C.	1.2	2.3	1.5	1.1	1.5	1.3	3.3	1.4

<u>U.S. States</u>								
1) New Jersey	56.4	60.2	65.4	61.9	48.3	58.7	60.1	40.3
2) New York	37.5	31.5	31.6	33.9	39.3	33.7	33.7	24.5
3) Pennsylvania	40.2	33.2	33.0	22.4	33.7	28.8	27.6	37.0

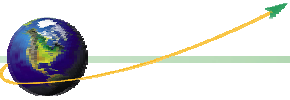
Note: The metropolitan areas of New York and Philadelphia each included part of the state of New Jersey; a indicated a statistically reliable increase and a indicates a statistically reliable decrease versus the previous year in terms of the proportion of all trips to each place

New Jersey's Traveler Profile in 2001



	<u>OVERNIGHT TRIPS</u>		<u>DAY TRIPS</u>	
	<u>Estimated Millions of Trips</u>	<u>Percent</u>	<u>Estimated Millions of Trips</u>	<u>Percent</u>
GENDER				
Male	21.0	47	58.8	48
Female	23.6	53	62.7	52
AGE				
18-34	12.9	29	28.3	23
35-54	18.7	42	53.2	44
55+	13.0	29	40.0	33
<i>Average Age</i>	<i>45.6</i>		<i>46.8</i>	
EDUCATION				
High School or Less	13.6	30	25.0	21
Some College	10.1	23	25.6	21
College Graduate	12.4	28	58.5	48
Post Graduate	8.6	19	12.4	10
INCOME				
Under \$25K	8.1	18	19.4	16
\$25K-\$49.9K	11.0	25	22.0	18
\$50K-\$74.9K	8.6	19	33.5	28
\$75K+	17.0	38	46.5	38
RACE				
White	33.9	76	98.8	81
African-American	8.0	18	15.3	13
Hispanic	1.8	4	1.6	1
Other	1.0	2	5.8	5

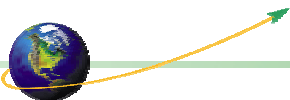
New Jersey's Overnight Traveler Profile 1994 to 2001



	<u>1994</u>	<u>1995</u>	<u>1996</u>	<u>1997</u>	<u>1998</u>	<u>1999</u>	<u>2000</u>	<u>2001</u>
GENDER (Millions)								
Male	17.9	18.5	18.3	20.2	19.6	20.4	21.2	21.0
Female	17.9	17.7	18.9	20.6	20.4	23.4	22.8	23.6
AGE (Millions)								
18-34	11.7	11.1	12.3	12.4	10.4	13.8	13.1	12.9
35-54	13.5	14.3	14.1	15.5	17.1	17.2	17.5	18.7
55+	10.5	10.7	10.9	12.9	12.4	12.8	13.3	13.0
<i>Average Age</i>	<i>44.2</i>	<i>45.4</i>	<i>45.2</i>	<i>46.2</i>	<i>46.6</i>	<i>45.3</i>	<i>45.7</i>	<i>45.6</i>
EDUCATION (Millions)								
High School or Less	8.3	8.9	8.9	8.9	8.7	14.0	13.1	13.6
Some College	8.4	7.9	8.5	10.5	8.9	11.6	11.7	10.1
College Graduate	11.5	12.2	12.9	14.3	14.4	10.1	11.5	12.4
Post Graduate	7.6	7.1	7.0	7.1	8.0	8.0	7.7	8.6
INCOME (Millions)								
Under \$25K	7.1	6.9	7.9	8.1	6.7	8.2	8.3	8.1
\$25K-\$49.9K	12.3	12.4	12.1	11.6	10.9	12.0	10.6	11.0
\$50K-\$74.9K	8.9	8.5	9.2	10.2	9.7	9.5	10.6	8.6
\$75K+	7.5	8.3	8.0	10.9	12.7	14.1	14.6	17.0
RACE (Millions)								
White	29.5	29.7	31.2	33.9	33.1	33.7	33.9	33.9
African-American	4.4	4.9	4.7	5.1	4.9	6.8	7.2	8.0
Hispanic	1.0	0.8	0.6	0.9	1.1	2.4	1.8	1.8
Other	0.9	0.8	0.9	1.0	0.9	0.8	1.1	1.0

Note: A □ indicates a statistically reliable increase, and a ○ , a statistically reliable decrease in terms of the proportion of all trips taken in that category.

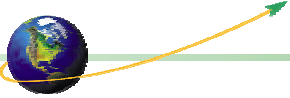
New Jersey's Day Traveler Profile 1994 to 2001



	<u>1994</u>	<u>1995</u>	<u>1996</u>	<u>1997</u>	<u>1998</u>	<u>1999</u>	<u>2000</u>	<u>2001</u>
GENDER (Millions)								
Male	60.3	68.5	81.5	65.3	58.3	60.1	68.9	58.8
Female	76.8	58.6	52.6	54.8	65.2	63.0	56.2	62.7
AGE (Millions)								
18-34	50.6	24.7	50.1	38.8	35.2	46.0	36.6	28.3
35-54	49.5	49.3	47.5	45.8	55.0	46.5	44.6	53.2
55+	36.9	53.1	36.3	35.5	33.4	30.5	43.9	40.0
<i>Average Age</i>	44.1	48.9	43.2	45.3	46.3	42.4	47.5	46.8
EDUCATION (Millions)								
High School or Less	41.0	43.3	48.8	35.1	34.7	30.0	37.8	25.0
Some College	33.4	28.2	22.8	27.1	28.0	29.1	30.9	25.6
College Graduate	47.8	35.8	54.8	40.6	36.7	45.2	26.9	58.5
Post Graduate	14.9	17.8	7.6	17.3	24.1	19.0	29.5	12.4
INCOME (Millions)								
Under \$25K	21.4	39.8	24.3	29.3	17.3	28.6	13.4	19.4
\$25K-\$49.9K	35.9	47.	34.2	32.9	39.5	35.1	30.8	22.0
\$50K-\$74.9K	44.3	23.8	38.9	39.8	35.4	25.3	38.9	33.5
\$75K+	35.6	16.3	36.7	18.1	31.4	34.1	42.1	46.5
RACE (Millions)								
White	N/A	N/A	105.3	93.3	96.6	97.2	101.7	98.8
African-American	N/A	N/A	12.7	15.0	11.4	11.0	10.4	15.3
Hispanic	N/A	N/A	8.0	6.0	5.6	4.8	3.9	1.6
Other	N/A	N/A	8.0	5.8	10.0	10.2	9.1	5.8

Note: A ☐ indicates a statistically reliable increase, and a ☐, a statistically reliable decrease in terms of the proportion of all trips taken in that category.

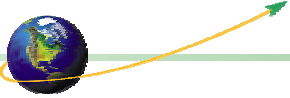
Activities Participated In – Overnight Trips



	<u>Estimated Millions of Trips</u>	<u>Percent</u>		<u>Estimated Millions of Trips</u>	<u>Percent</u>
1) Casino Gaming	18.0	40	19) Fishing (Saltwater)	0.7	2
2) Went To An Ocean Beach	9.7	22	20) Short Guided Tour	0.7	2
3) Boardwalk Activities	8.0	18	21) Bowling	0.7	2
4) Bar/Disco/Nightclub	4.7	10	22) Went to a Lakeside Beach	0.7	2
5) Swam in A Pool	4.2	9	23) Day Cruise (Not Overnight)	0.6	1
6) Entertainment/Shows	3.8	8	24) Rock Concert	0.5	1
7) Landmarks/Historic Sites	3.1	7	25) Power Boating/Sailing	0.4	1
8) Miniature Golf	2.4	5	26) Golf	0.4	1
9) Used a Sauna/Hot Tub	2.1	5	27) Art Gallery	0.3	1
10) Theme Park	1.6	4	28) Theater/Dance/Symphony/Opera	0.3	1
11) National/State Park	1.5	3	29) Pick Your Own Farms	0.3	1
12) Zoo	1.3	3	30) Canoeing/Kayaking	0.2	<1
13) Museum/Science Exhibit	1.1	2	31) Fishing (Freshwater)	0.2	<1
14) Forest/Wildlife Area	1.0	2	32) Professional/College Sports Event	0.2	<1
15) Bicycling	1.0	2	33) Tennis	0.2	<1
16) Fair/Exhibition/Festival	0.9	2	34) Car/Dog/Horse Race	0.1	<1
17) Hiking	0.9	2	35) Snow Skiing	0.1	<1
18) Birdwatching	0.7	2			

Source: Longwoods International

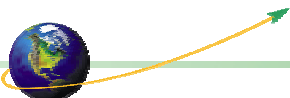
Activities Participated In – Day Trips



Estimated Millions of Trips			Percent
1)	Casino Gaming	54.3	45
2)	Went To An Ocean Beach	26.1	22
3)	Boardwalk Activities	22.0	18
4)	Bar/Disco/Nightclub	16.6	14
5)	Swam in A Pool	14.0	11
6)	Entertainment/Shows	11.9	10
7)	Used a Sauna/Hot Tub	10.9	9
8)	Landmarks/Historic Sites	10.6	9
9)	National/State Park	9.7	8
10)	Theater/Dance/Symphony/Opera	9.0	7
11)	Hiking	9.0	7
12)	Theme Park	7.9	6
13)	Pick Your Own Farms	7.0	6
14)	Museum/Science Exhibit	6.6	5
15)	Golf	6.1	5
16)	Zoo	5.6	5
Estimated Millions of Trips			Percent
17)	Bicycling	5.2	4
18)	Forest/Wildlife Area	4.5	4
19)	Miniature Golf	4.1	3
20)	Day Cruise (Not Overnight)	4.1	3
21)	Fishing (Saltwater)	3.5	3
22)	Tennis	3.5	3
23)	Short Guided Tour	3.0	2
24)	Professional/College Sports Event	2.9	2
25)	Bowling	2.6	2
26)	Birdwatching	2.6	2
27)	Art Gallery	2.6	2
28)	Canoeing/Kayaking	2.6	2
29)	Power Boating/Sailing	1.9	2
30)	Fair/Exhibition/Festival	1.7	1
31)	Went to a Lakeside Beach	1.5	1
32)	Car/Dog/Horse Race	1.2	1

Source: Longwoods International

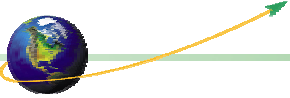
Activities Participated In On Overnight Trip 1994 to 2001



	<u>1994</u> (Millions)	<u>1995</u> (Millions)	<u>1996</u> (Millions)	<u>1997</u> (Millions)	<u>1999</u> (Millions)	<u>2000</u> (Millions)	<u>2001</u> (Millions)
Casino Gaming	13.0	14.1	13.6	15.2	18.2	17.7	18.0
Went to an Ocean Beach	8.5	7.7	8.5	9.0	10.0	10.2	9.7
Boardwalk Activities	10.4	6.6	7.0	7.6	7.8	8.8	8.0
Entertainment/Shows	4.1	4.5	4.7	4.3	4.6	3.5	3.8
Bar/Disco/Nightclub	3.8	3.6	3.7	3.4	5.6	3.9	4.7
Landmarks/Historic Sites	2.5	3.6	3.2	2.9	2.2	2.7	3.1
Swam in a Pool	4.3	4.0	2.9	2.9	4.3	3.6	4.2
Miniature Golf	2.5	2.7	1.7	2.1	2.2	2.1	2.4
National/State Park	0.8	1.8	1.7	1.8	1.8	2.0	1.5
Fair/Exhibition/Festival	1.0	1.7	1.3	1.2	1.1	0.9	0.9

Note: A □ indicates a statistically reliable increase, and a ○, a statistically reliable decrease versus the previous year in terms of the proportion of all trips taken including that activity.

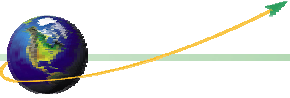
Activities Participated In On Day Trips 1994 to 2001



	<u>1994</u> (Millions)	<u>1995</u> (Millions)	<u>1996</u> (Millions)	<u>1997</u> (Millions)	<u>1999</u> (Millions)	<u>2000</u> (Millions)	<u>2001</u> (Millions)
Casino Gaming	34.1	32.7	48.9	41.7	42.7	68.0	54.3
Boardwalk Activities	33.2	15.8	26.0	30.7	21.7	22.4	22.0
Went to an Ocean Beach	20.3	17.0	24.5	25.9	24.7	30.0	26.1
Entertainment/Shows	16.6	6.9	13.4	26.4	7.3	15.3	11.9
Bar/Disco/Nightclub	20.9	7.2	9.5	14.8	21.5	10.1	16.6
National/State Park	16.6	8.5	9.4	14.6	10.8	7.6	9.7
Theme Park	20.3	13.5	8.9	12.5	11.9	3.1	7.9
Swam in a Pool	4.3	4.0	2.9	3.4	9.2	12.6	14.0
Zoo	8.7	7.5	5.2	4.6	1.9	1.1	5.6
Fishing (Saltwater)	5.5	9.4	4.2	3.5	5.0	2.4	3.5

Note: A ☐ indicates a statistically reliable increase, and a ☐, a statistically reliable decrease versus the previous year in terms of the proportion of all trips taken including that activity.

Size of the New Jersey Travel Party

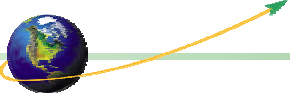


	<u>Average # of People</u>
DAY TRIPS	
Adults	2.2
Children*	<u>0.6</u>
<i>Total</i>	2.8
OVERNIGHT TRIPS	
Adults	2.3
Children*	<u>0.4</u>
<i>Total</i>	2.7
DAY AND OVERNIGHT TRIPS	
Adults	2.2
Children*	<u>0.5</u>
<i>Total</i>	2.7

* Under 18

Source: Longwoods International

Length of Stay on Overnight Trips and Accommodations Used

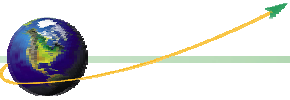


Average Length of Stay in New Jersey = 3.12 Nights
Total Trip Nights = 135.1 Million

<u>Type of Accommodation</u>	<u>Estimated Millions of Trip Nights</u>	<u>Percent</u>
Hotel or Motel	61.6	46
Home of Friends/Relatives	16.1	12
Rented Cottage	7.6	6
Own House	9.0	7
Seasonal Rental	3.3	2
Condominium	3.8	3
Country Inn/Bed & Breakfast	0.9	1
Other	32.7	24

Source: Longwoods International

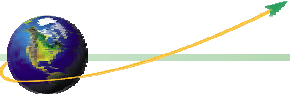
Places Seen/Visited or Experienced – Overnight Trips



	<u>%</u>	<u>Estimated Millions of Trips</u>
Atlantic City	38	17.1
Cape May	9	4.0
Wildwood Boardwalk	7	3.1
The Wildwoods	7	2.9
Newark Airport	7	2.9
Ocean City	6	2.8
Ocean City Boardwalk	6	2.8
Cape May Lighthouse	5	2.2
Brigantine	4	1.9
Toms River	4	1.7
Stone Harbor	4	1.6
Barnegat Baymen's & Decoy Museum	3	1.4
Sea Isle City	3	1.3
Seaside Heights	3	1.3
Long Beach Island	3	1.2
Point Pleasant Beach	3	1.2
Newark	2	1.1
Margate	2	1.1
Historic Smithville	2	1.1
Princeton	2	0.9

	<u>%</u>	<u>Estimated Millions of Trips</u>
Elizabeth (Part of Newark Airport)	2	0.9
Paramus Malls	2	0.9
Lucy the Elephant/Margate	2	0.9
Avalon	2	0.9
Delaware Water Gap Nat'l Recreation Area	2	0.8
Six Flags Great Adventure	2	0.8
Hoboken/NJ Waterfront	2	0.8
Cape May Wildlife Refuge/Bird Observatory	2	0.7
Island Beach State Park	2	0.7
Lake Hopatcong	1	0.6
Meadowlands Sports Complex	1	0.5
Belmar	1	0.5
Historic Morristown	1	0.5
Pine Barrens	1	0.5
Story Book Land	1	0.5
Classic Car Show	1	0.5
Bridgewater Commons	1	0.4
Freehold/Monmouth Park	1	0.4
Bridgeton	1	0.4
Statue of Liberty/Ellis Island	1	0.4

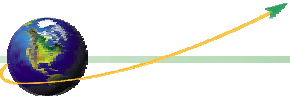
Places Seen/Visited or Experienced – Overnight Trips



	<u>%</u>	<u>Estimated Millions of Trips</u>
Noyes Museum of Art	1	0.4
Scotch Plains	1	0.4
NJ State Aquarium/Camden	1	0.4
New Brunswick (Rutgers)	1	0.4
Hereford Inlet Lighthouse	1	0.4
Tweeter Center	1	0.4
Liberty State Park/Science Center	1	0.3
Short Hills Mall	1	0.3
Renault Winery	1	0.3
Ocean Grove	1	0.3
Sandy Hook Gateway National Rec. Area	1	0.3
Mount Holly	1	0.3
Mullica Hill	1	0.3
Flemington	1	0.3
Somerville	1	0.3
Wetlands Institute	1	0.3
Wayne	1	0.3
Riverfest/Red Bank	1	0.3
Spring Lake	1	0.3

	<u>%</u>	<u>Estimated Millions of Trips</u>
Cowtown Rodeo/Woodstown	1	0.3
Historic Gardner's Basin	1	0.3
East Point Lighthouse	1	0.2
Plainfield	1	0.2
Rahway	1	0.2
Secaucus Outlet Shops	1	0.2
Lakehurst	1	0.2
Salem	1	0.2
Tuckerton Seaport	1	0.2
Forsyth Wildlife Reserve	1	0.2
Cumberland County Nature Areas	1	0.2
Wheaton Village	<1	0.2
Montclair Art Museum	<1	0.2
Westfield	<1	0.2
Marine Mammal Stranding Center/Brigantine	<1	0.2
Jenkinson's Aquarium	<1	0.2
Garden State Park	<1	0.2
Woodbury	<1	0.2

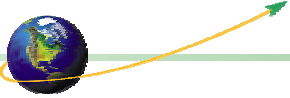
Places Seen/Visited or Experienced – Overnight Trips



	<u>%</u>	<u>Estimated Millions of Trips</u>
Delaware/Raritan Canal State Park	<1	0.1
Lambertville	<1	0.1
Waterloo Village	<1	0.1
Fortescue	<1	0.1
Ikea Shopping Center/Elizabeth	<1	0.1
Port at Elizabeth	<1	0.1
Springfield Battlegrounds/Presb. Church	<1	0.1
Batsto Village	<1	0.1
Burlington City	<1	0.1
Kean College	<1	0.1
Mountain Creek	<1	0.1
Allaire State Park	<1	0.1
Seafarers Weekend	<1	0.1
Jockey Hollow at Morristown	<1	0.1
NJ Performing Arts Center	<1	0.1
Duke Gardens	<1	0.1
Highpoint State Park	<1	0.1
Berkely Heights (Bell Labs)	<1	0.1
Great Falls National Historic District/Paterson	<1	0.1

	<u>%</u>	<u>Estimated Millions of Trips</u>
Newark Museum	<1	0.1
NJ Aviation Museum Hall of Fame-Teterboro	<1	0.1
Passaic	<1	0.1
Ringwood/Skylands Gardens	<1	0.1
Spirit of NJ	<1	0.1
Monmouth Battlefield	<1	0.1
Twin Lights of Navesink Historic Site	<1	0.1
Historic Society Museum	<1	0.1
Mercer County Waterfront Stadium	<1	0.1
Washington Crossing State Park	<1	0.1
Wild West City	<1	0.1
Festival of the Atlantic Concerts	<1	0.1
Cardinal's Minor League Baseball Team	<1	0.1
Liberty Village	<1	0.1
Cape May Music Festival	<1	0.1
Ocean Life Center	<1	0.1
Trenton Thunder AAA Baseball	<1	0.1
Cape May Victorian Week	<1	0.1
Irish Festival	<1	0.1

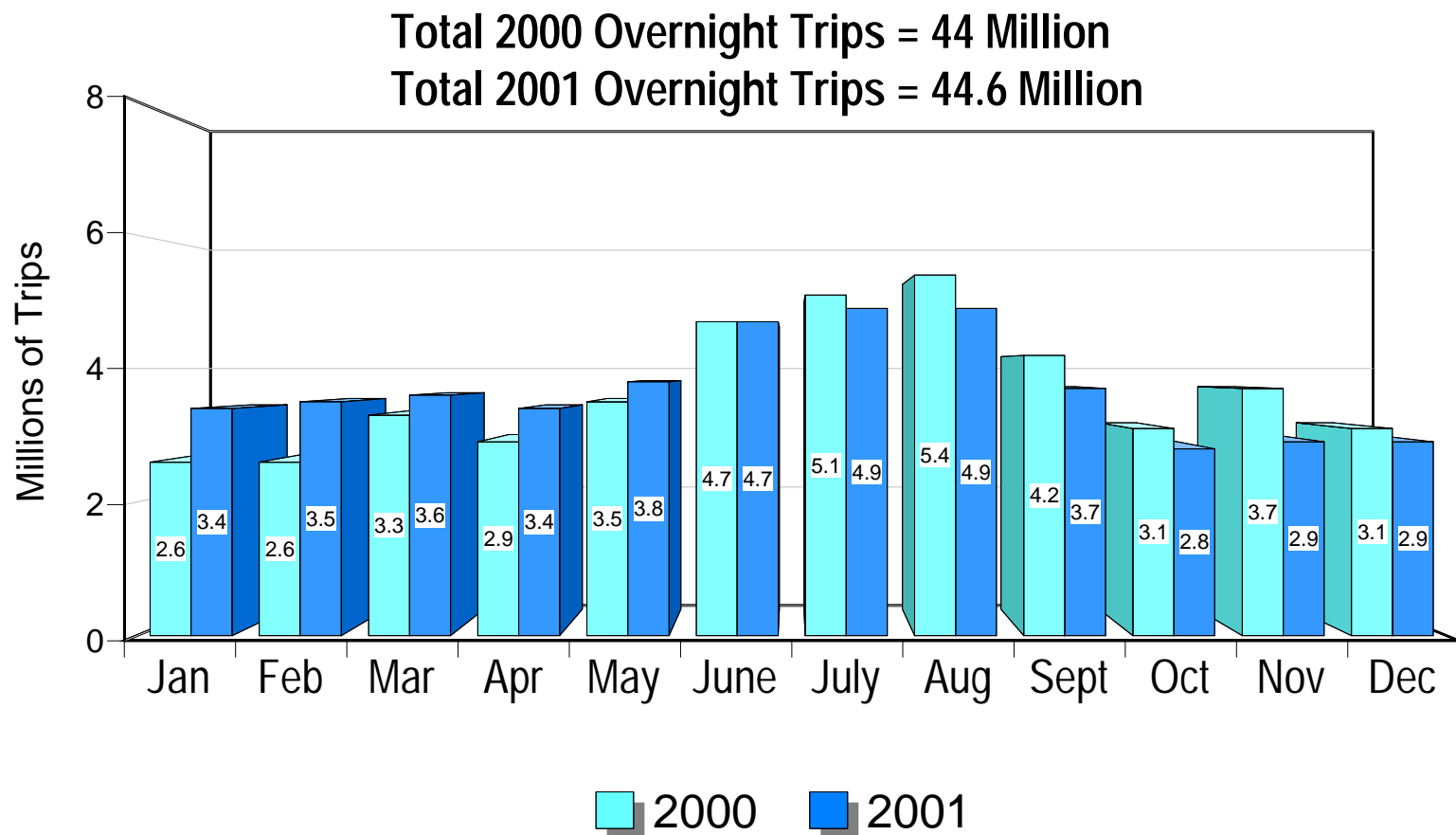
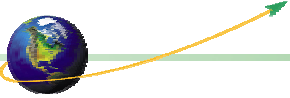
Places Seen/Visited or Experienced – Overnight Trips



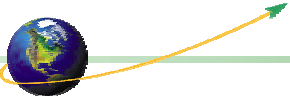
	<u>%</u>	<u>Estimated Millions of Trips</u>
Franklin Mineral Museum & Sterling Mine	<1	<0.1
Historic Chester	<1	<0.1
Middlebrook Campgrounds	<1	<0.1
NJ Renaissance Festival	<1	<0.1
NJ Shakespeare Festival	<1	<0.1
Round Valley/Spruce Run Res.	<1	<0.1
Tour of Somerville	<1	<0.1
U.S. Golf Association Golf House Museum	<1	<0.1
Delaware Bay Schooner	<1	<0.1
American Labor Museum/Botto House	<1	<0.1
Edison National Historic Site	<1	<0.1
Medieval Times	<1	<0.1
Princeton Forestal Center	<1	<0.1
Summit Hotel	<1	<0.1
Antiquing	<1	<0.1
Appel Farm/Elmer	<1	<0.1
Fort Mott State Park	<1	<0.1
Market Street Day	<1	<0.1

	<u>%</u>	<u>Estimated Millions of Trips</u>
Swedesboro	<1	<0.1
Trenton	<1	<0.1
Wings 'n' Water Festival	<1	<0.1
Craftsman Farms	<1	<0.1
Cooper Gristmill	<1	<0.1
Chatsworth Cranberry Festival	<1	<0.1
NJ Seafood Festival	<1	<0.1
NJ Festival of Ballooning	<1	<0.1
A.J. Meerwald	<1	<0.1
American Indian Arts Festival	<1	<0.1
Paper Mill Playhouse	<1	<0.1
NJ State Fair	<1	<0.1
Rancocas Indian Reservation	<1	<0.1
NJ Flower and Garden Show	<1	<0.1
Shad Festival/Lambertville	<1	<0.1
Miss America Pageant	<1	<0.1
Ocean County Decoy & Gunning Show	<1	<0.1

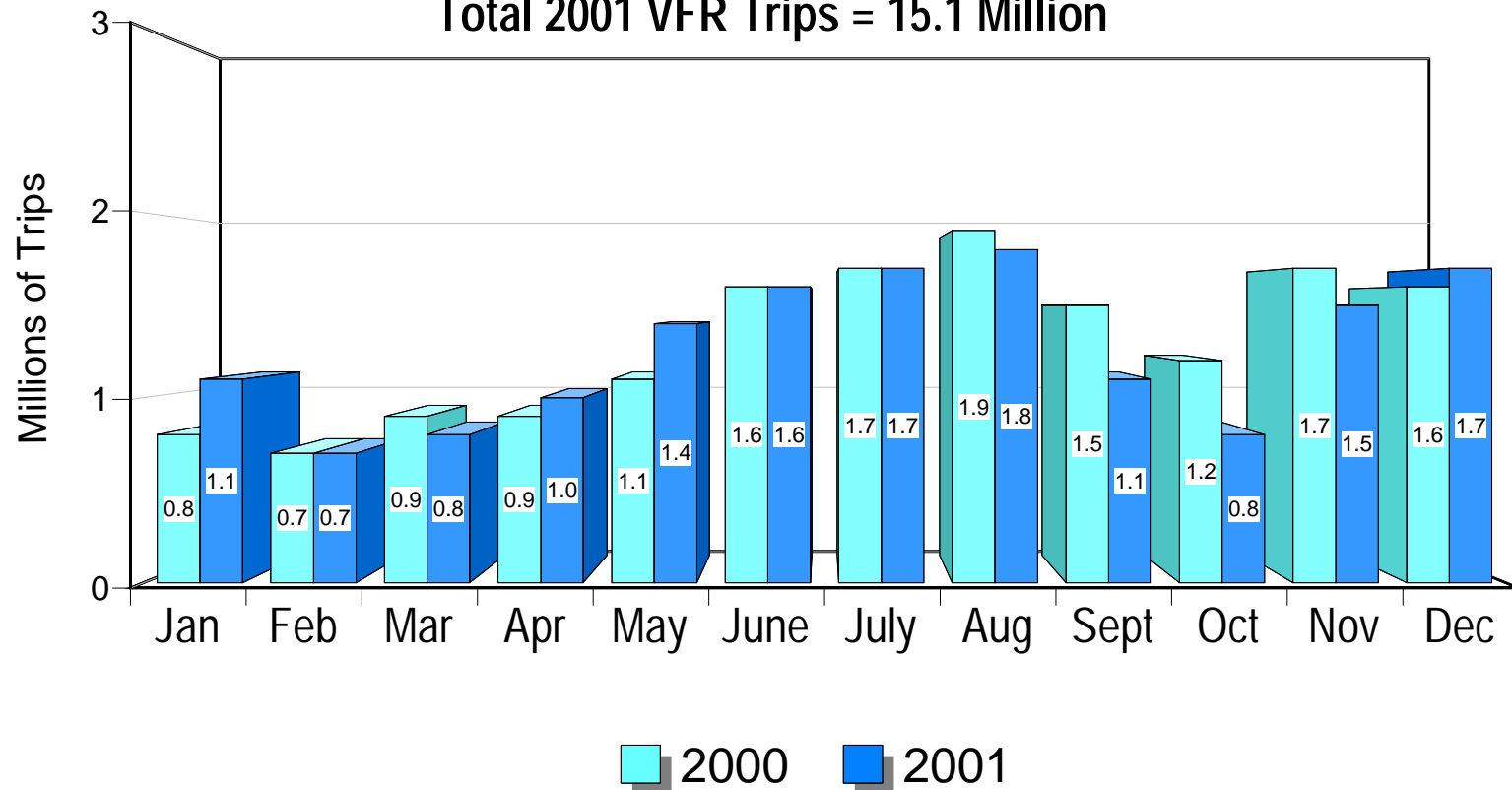
Overnight Trips to New Jersey by Month



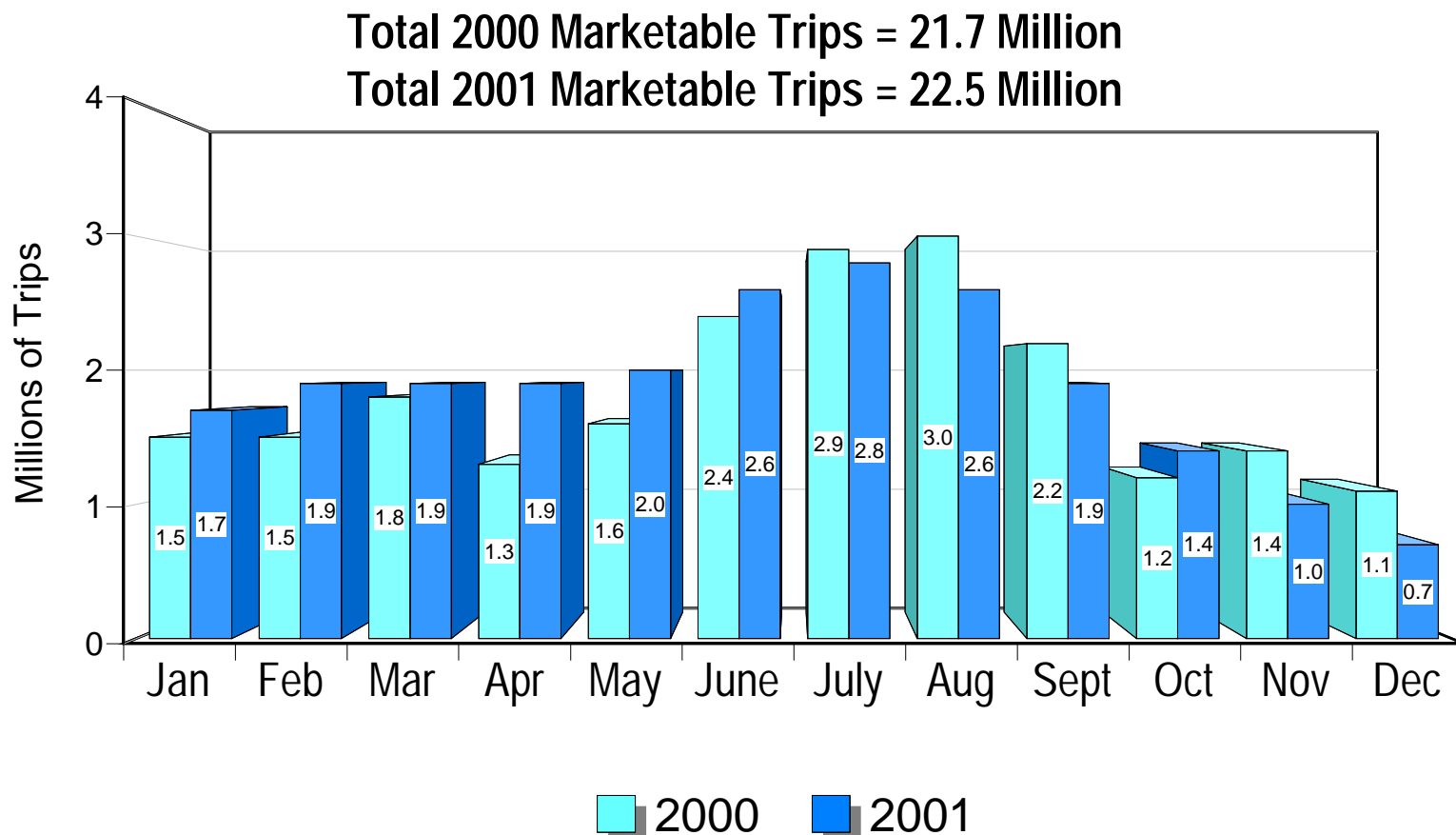
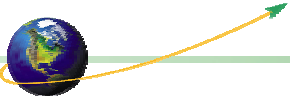
Overnight VFR Trips to New Jersey by Month



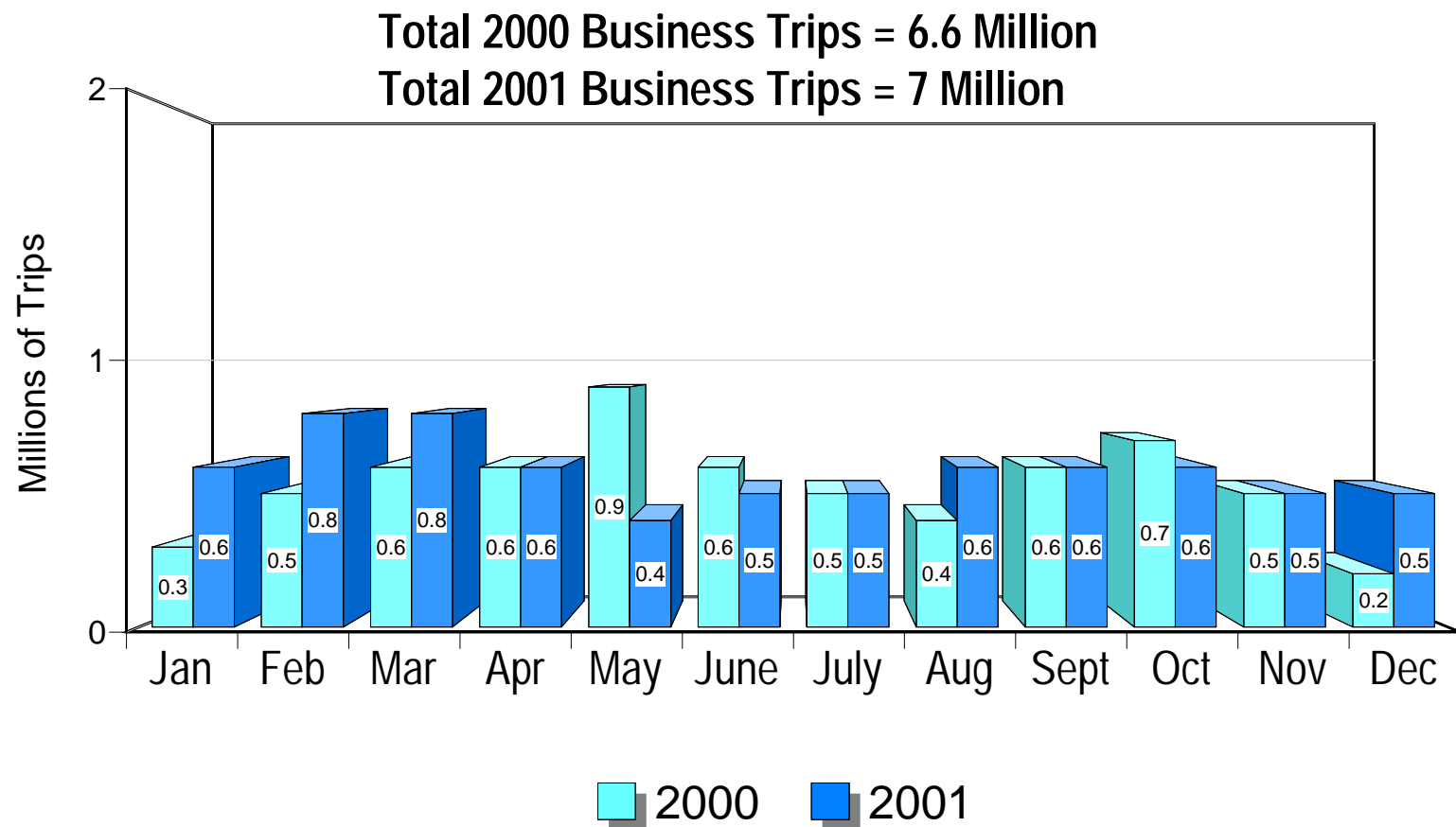
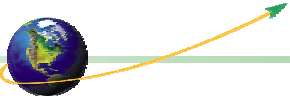
Total 2000 VFR Trips = 15.7 Million
Total 2001 VFR Trips = 15.1 Million



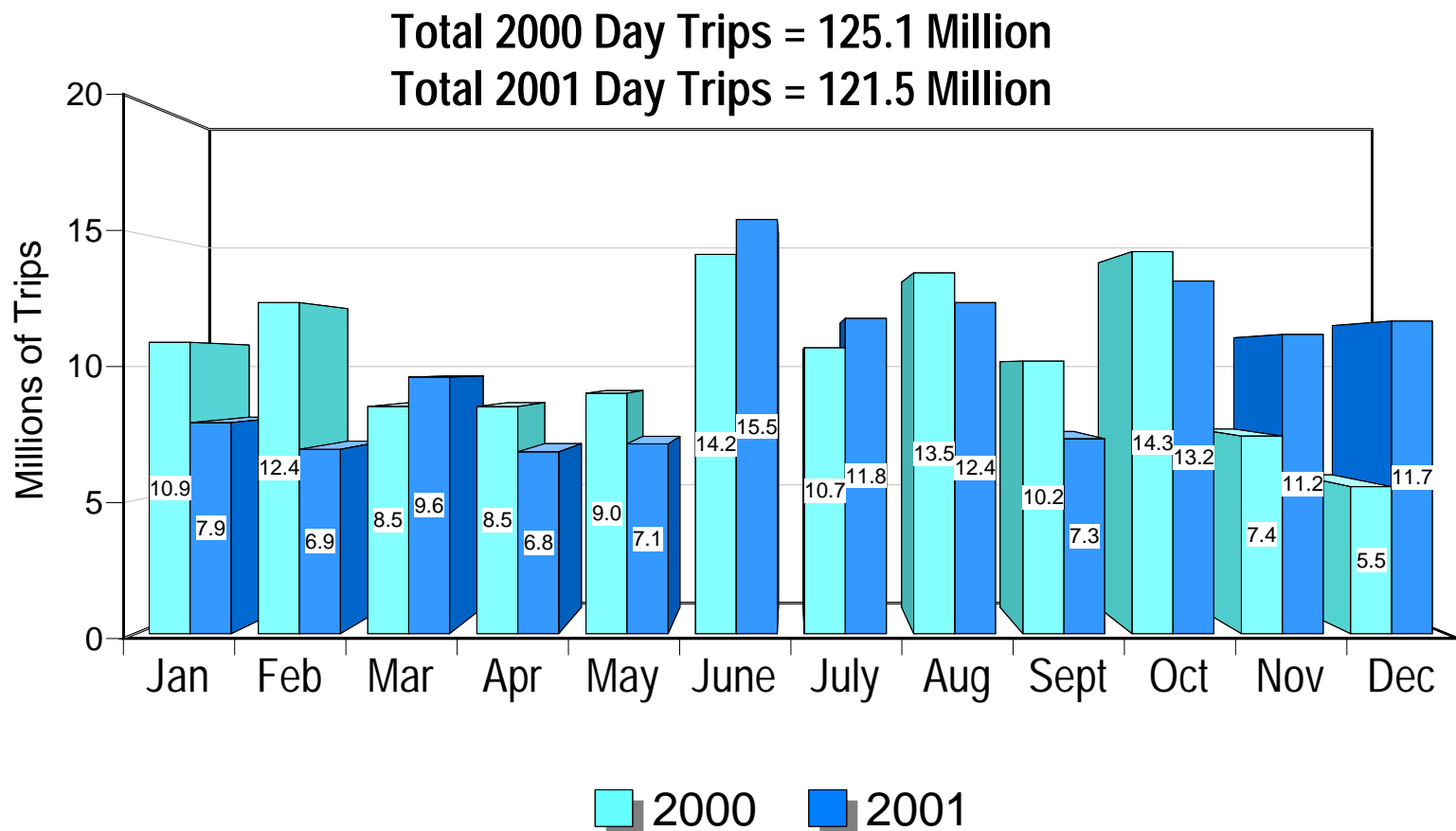
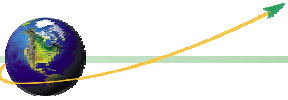
Overnight Marketable Pleasure Trips to New Jersey by Month



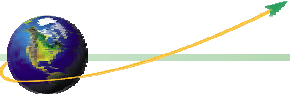
Overnight Business Trips to New Jersey by Month



Day Trips to New Jersey by Month



Distribution of Trips By Month



OVERNIGHT TRIPS

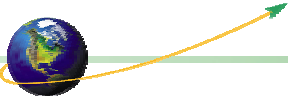
	<u>Estimated Millions of Trips</u>	<u>Percent</u>
January	3.4	8
February	3.5	8
March	3.6	8
April	3.4	8
May	3.8	8
June	4.7	11
July	4.9	11
August	4.9	11
September	3.7	8
October	2.8	6
November	2.9	6
December	2.9	7

DAY TRIPS

	<u>Estimated Millions of Trips</u>	<u>Percent</u>
January	7.7	6
February	7.0	6
March	9.7	8
April	6.8	6
May	7.1	6
June	15.5	13
July	11.8	10
August	12.4	10
September	7.3	6
October	13.2	11
November	11.2	9
December	11.7	10

Source: Longwoods International

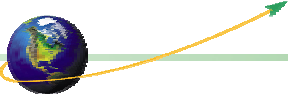
Distribution of Overnight Trips By Month 1994 to 2001



	<u>1994</u> (Millions)	<u>1995</u> (Millions)	<u>1996</u> (Millions)	<u>1997</u> (Millions)	<u>1998</u> (Millions)	<u>1999</u> (Millions)	<u>2000</u> (Millions)	<u>2001</u> (Millions)
January	1.4	1.9	1.9	2.2	2.2	2.5	2.6	3.4
February	1.4	1.6	1.6	1.9	2.1	2.5	2.6	3.5
March	1.8	2.2	2.3	2.8	2.3	3.1	3.3	3.6
April	2.1	2.1	2.5	2.4	2.6	3.5	2.9	3.4
May	2.9	3.2	3.3	3.4	3.6	3.7	3.5	3.8
June	4.3	4.4	4.5	4.2	5.0	5.2	4.7	4.7
July	4.7	4.5	3.9	4.5	4.7	5.0	5.1	4.9
August	4.7	4.4	4.5	4.9	4.6	5.1	5.4	4.9
September	3.6	3.4	3.1	3.7	4.0	3.9	4.2	3.7
October	3.6	2.7	3.1	3.5	2.9	3.0	3.1	2.8
November	2.5	2.7	2.9	3.6	2.9	2.8	3.7	2.9
December	2.9	3.1	3.4	3.7	3.2	3.4	3.1	2.9

Note: A ☐ indicates a statistically reliable increase, and a ☐ , a statistically decrease versus the previous year in terms of the proportion of all trips taken during that time period.

Distribution of Day Trips By Month 1994 to 2001



	<u>1994</u> (Millions)	<u>1995</u> (Millions)	<u>1996</u> (Millions)	<u>1997</u> (Millions)	<u>1998</u> (Millions)	<u>1999</u> (Millions)	<u>2000</u> (Millions)	<u>2001</u> (Millions)
January	9.6	11.0	7.0	5.3	9.3	7.1	10.9	7.7
February	9.6	14.4	7.6	5.4	8.8	8.9	12.5	7.0
March	11.0	13.3	9.1	6.9	11.8	9.6	8.5	9.7
April	6.9	7.8	9.0	8.7	5.1	7.4	8.5	6.8
May	8.2	8.9	14.1	10.2	8.2	11.2	9.0	7.1
June	13.7	14.2	15.5	16.1	12.9	15.2	14.3	15.5
July	20.6	11.5	16.2	15.7	16.3	13.4	10.7	11.8
August	20.6	11.2	16.2	17.4	21.2	14.0	13.5	12.4
September	16.5	10.6	15.2	11.7	7.5	12.6	10.2	7.3
October	8.2	10.0	11.5	9.4	9.7	8.7	14.3	13.2
November	6.9	7.1	6.3	7.0	6.7	7.5	7.4	11.2
December	6.9	7.0	6.4	6.3	3.6	7.6	5.6	11.7

Note: A ☐ indicates a statistically reliable increase, and a ☐ , a statistically decrease versus the previous year in terms of the proportion of all trips taken during that time period.

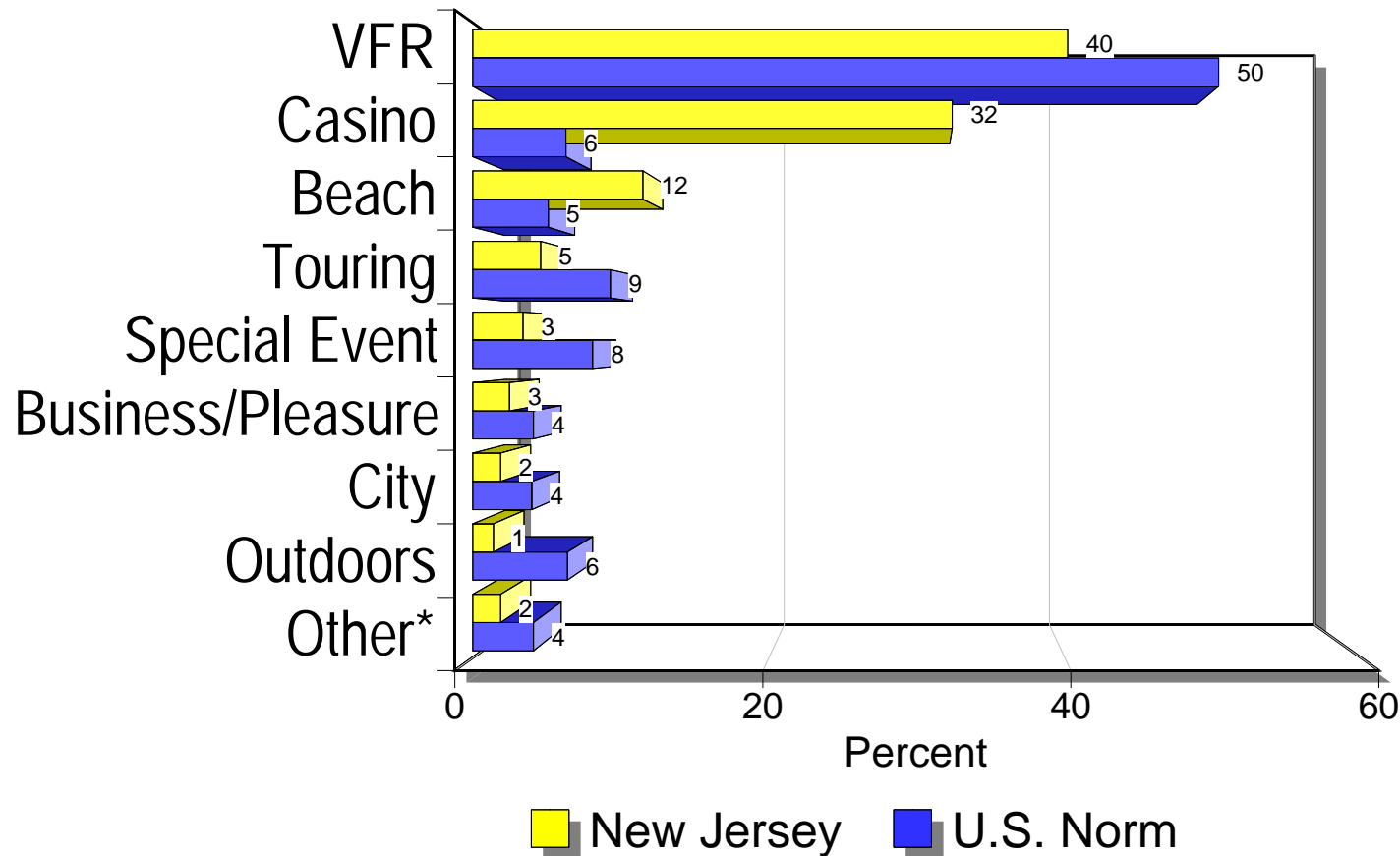
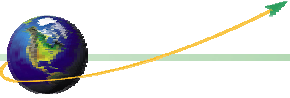


New Jersey's Pleasure Travel Market



Pleasure Travel Profile

Main Purpose of Overnight Pleasure Trips vs. The U.S. Norm

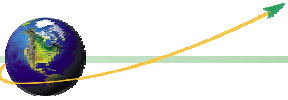


*Includes Country Resort, Ski, Cruise, and Theme Park

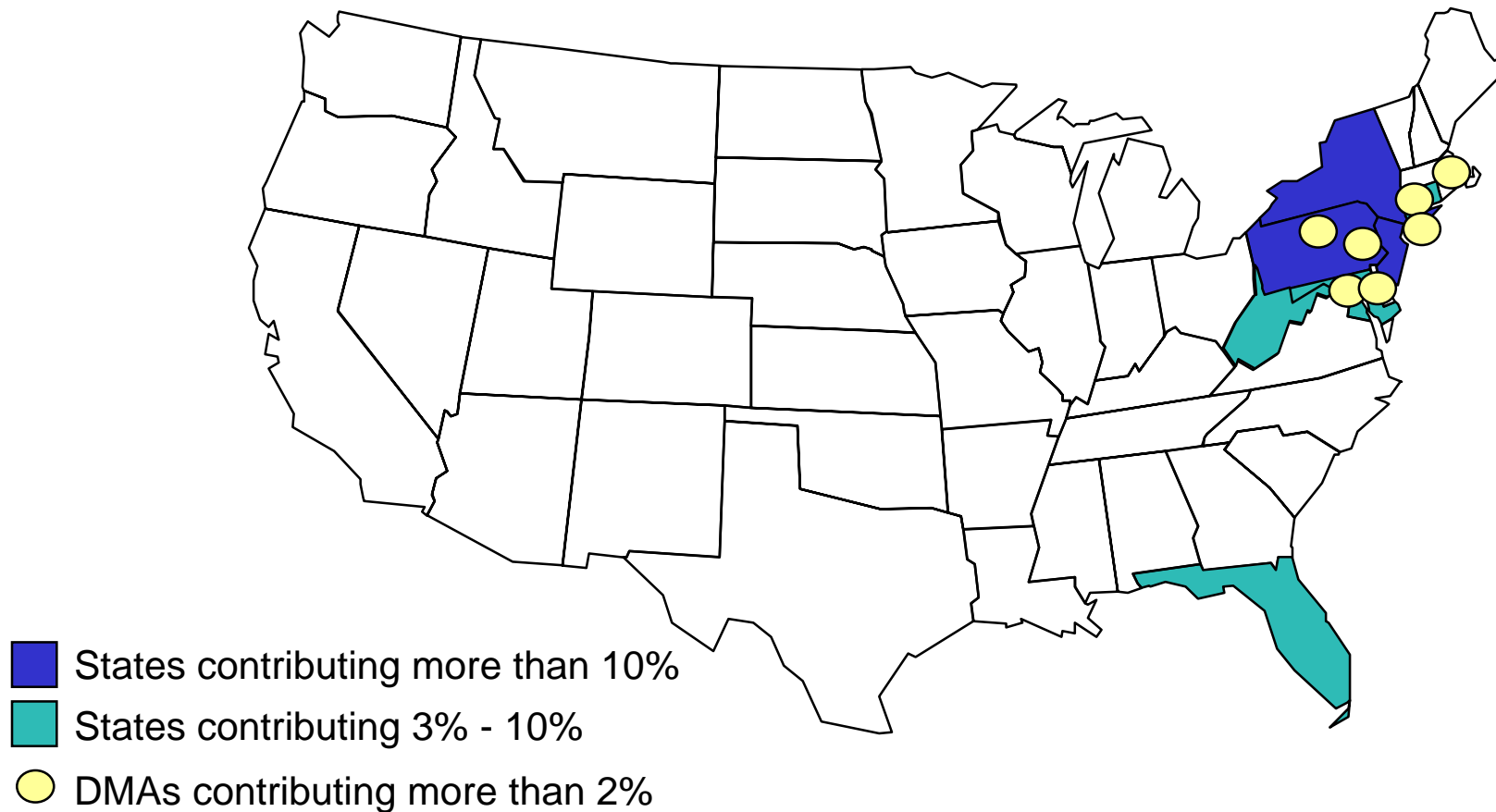


Sources of Business

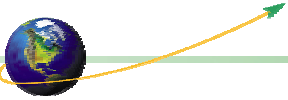
Sources of Business



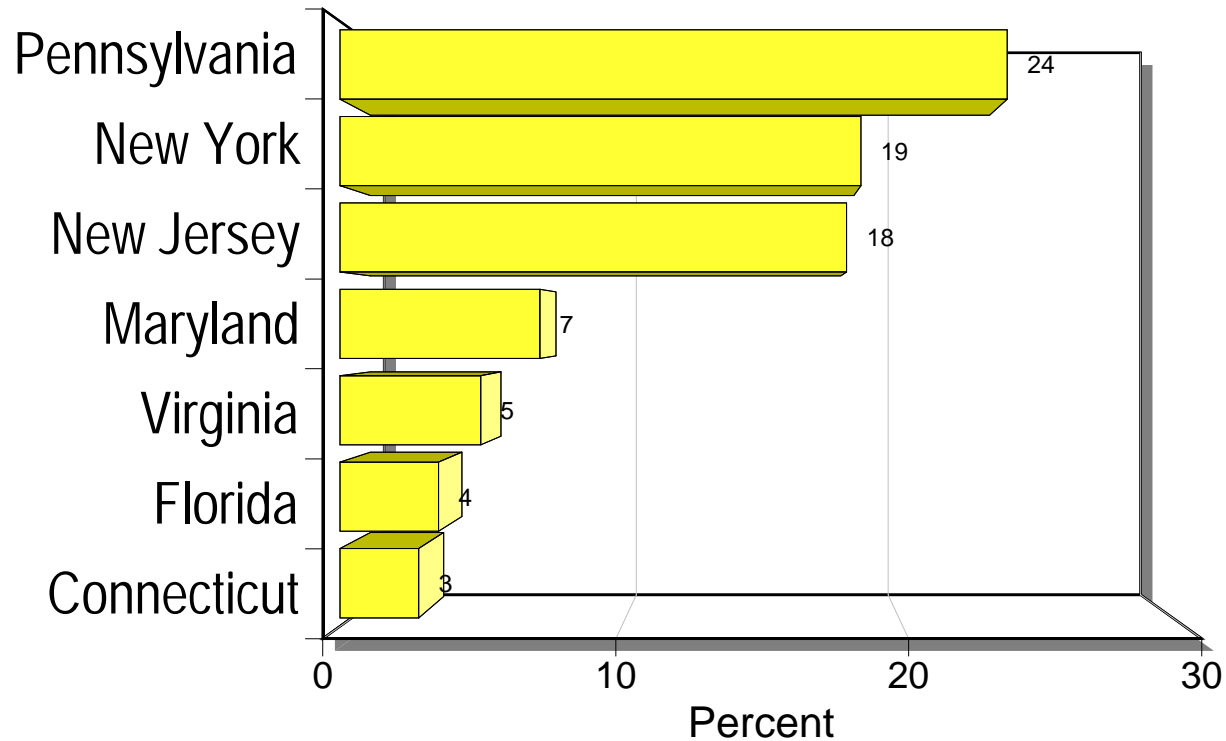
Base: Overnight Pleasure Trips



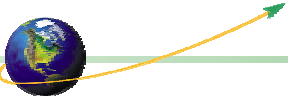
State Sources of Business



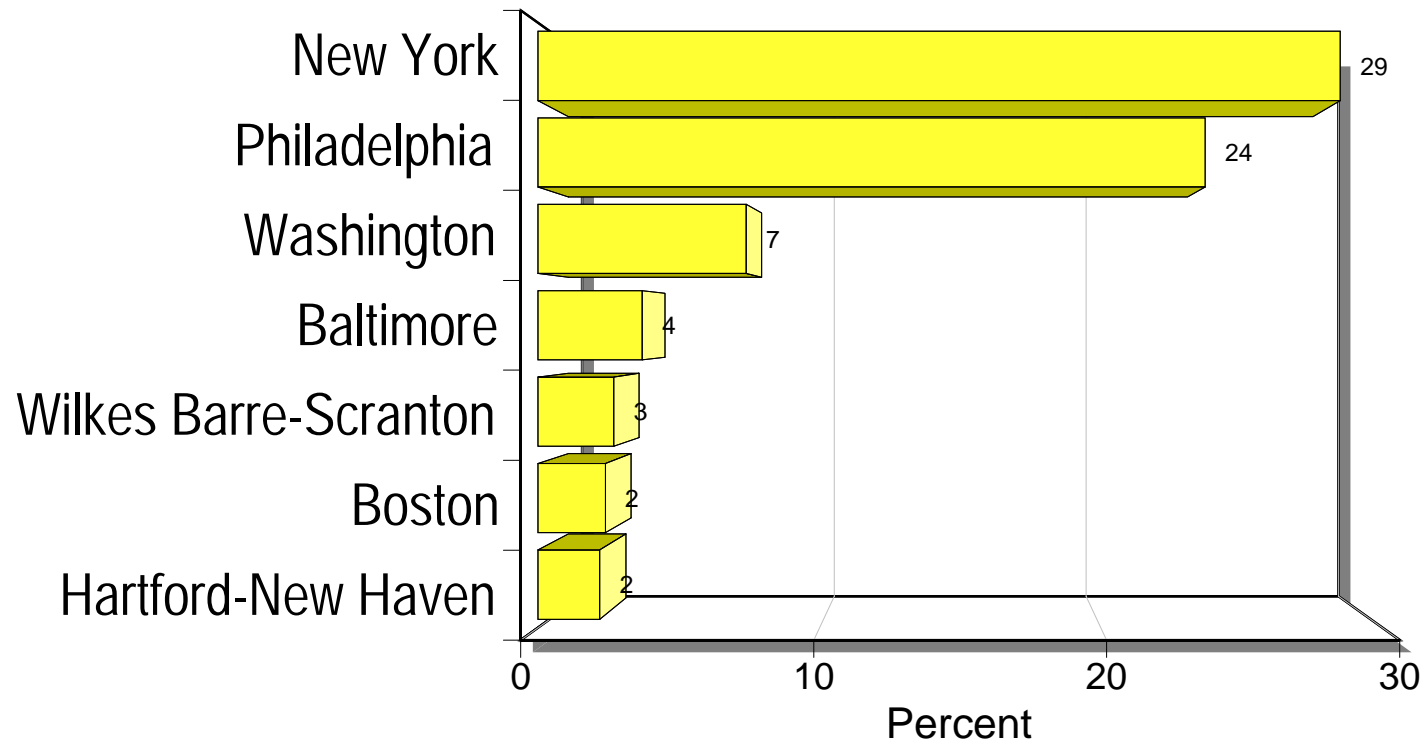
Base: Overnight Pleasure Trips



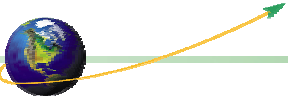
Urban Sources of Business



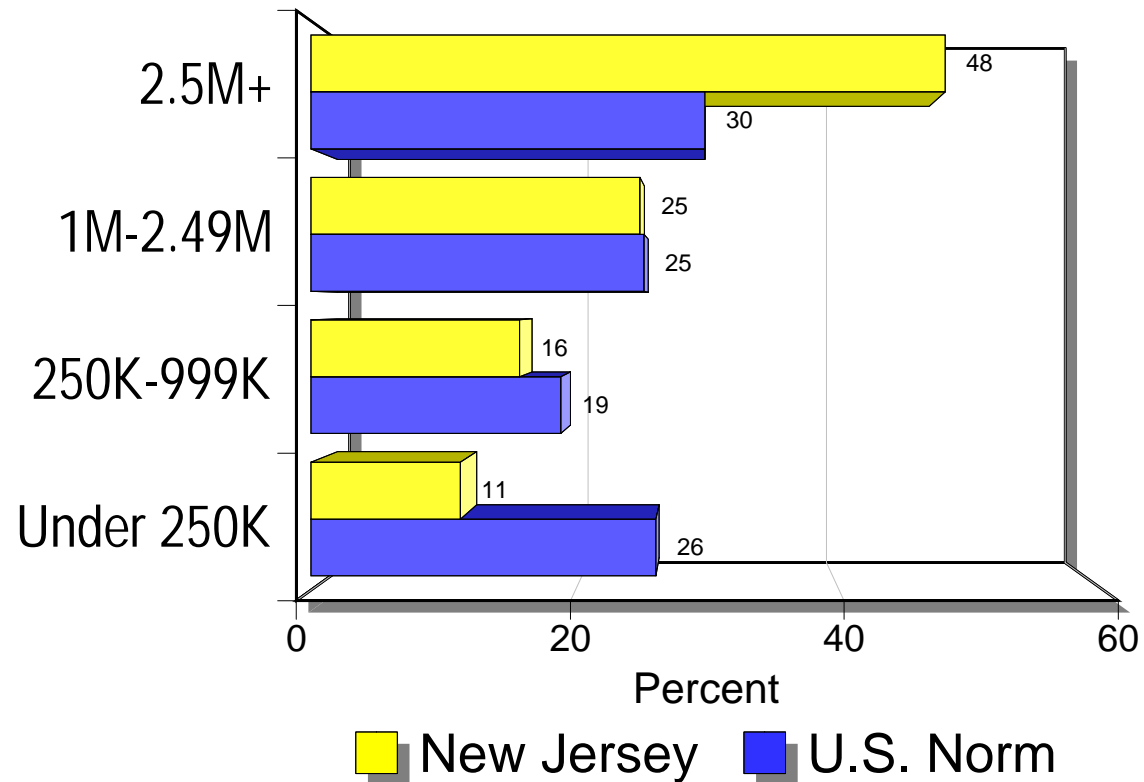
Base: Overnight Pleasure Trips



Community Size



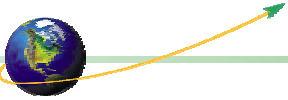
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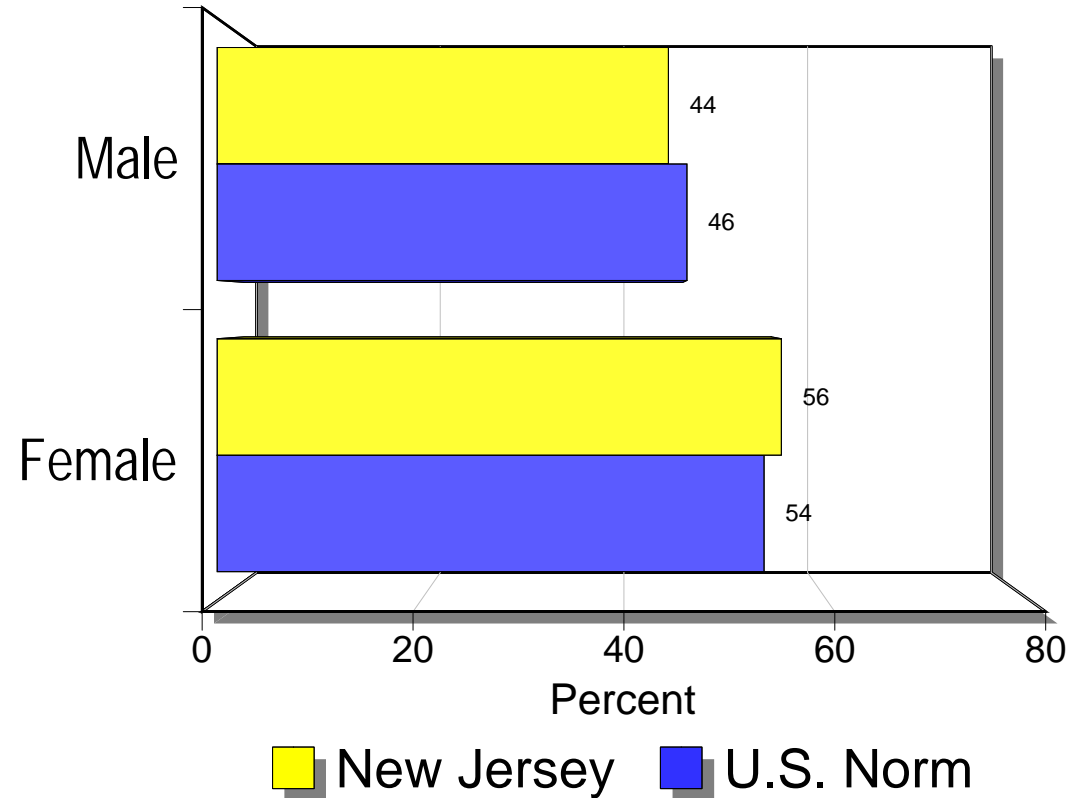


Demographics

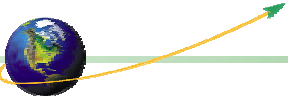
Gender



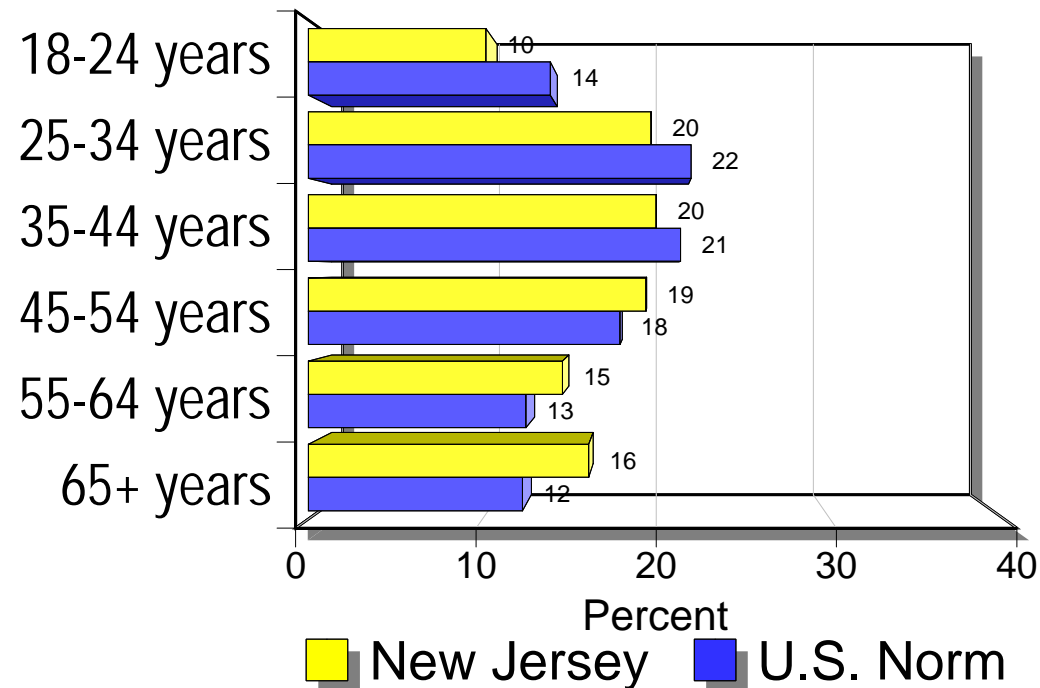
Base: Overnight Pleasure Trips



Age

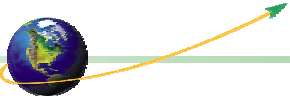


Base: Overnight Pleasure Trips

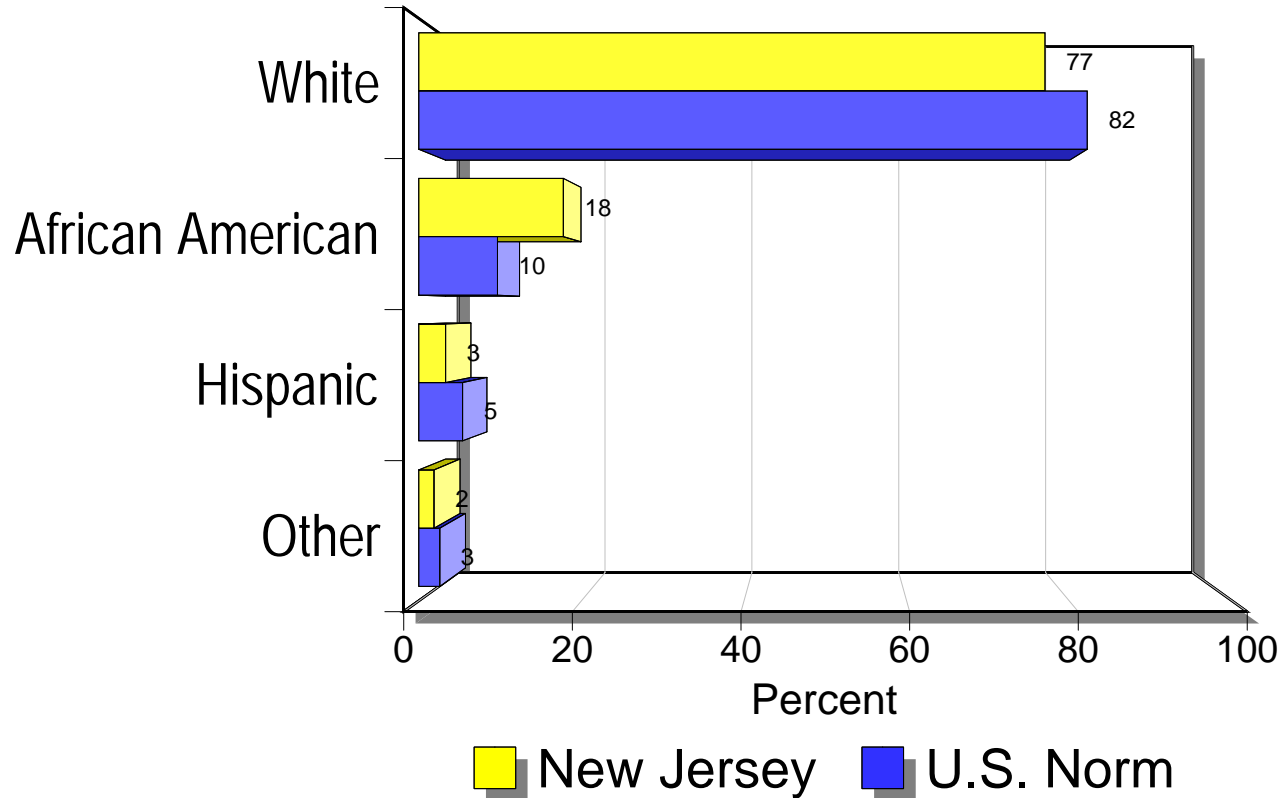


	<u>New Jersey</u>	<u>U.S. Norm</u>
Average Age	45.8	43.1

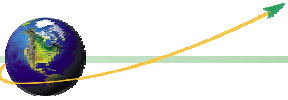
Race



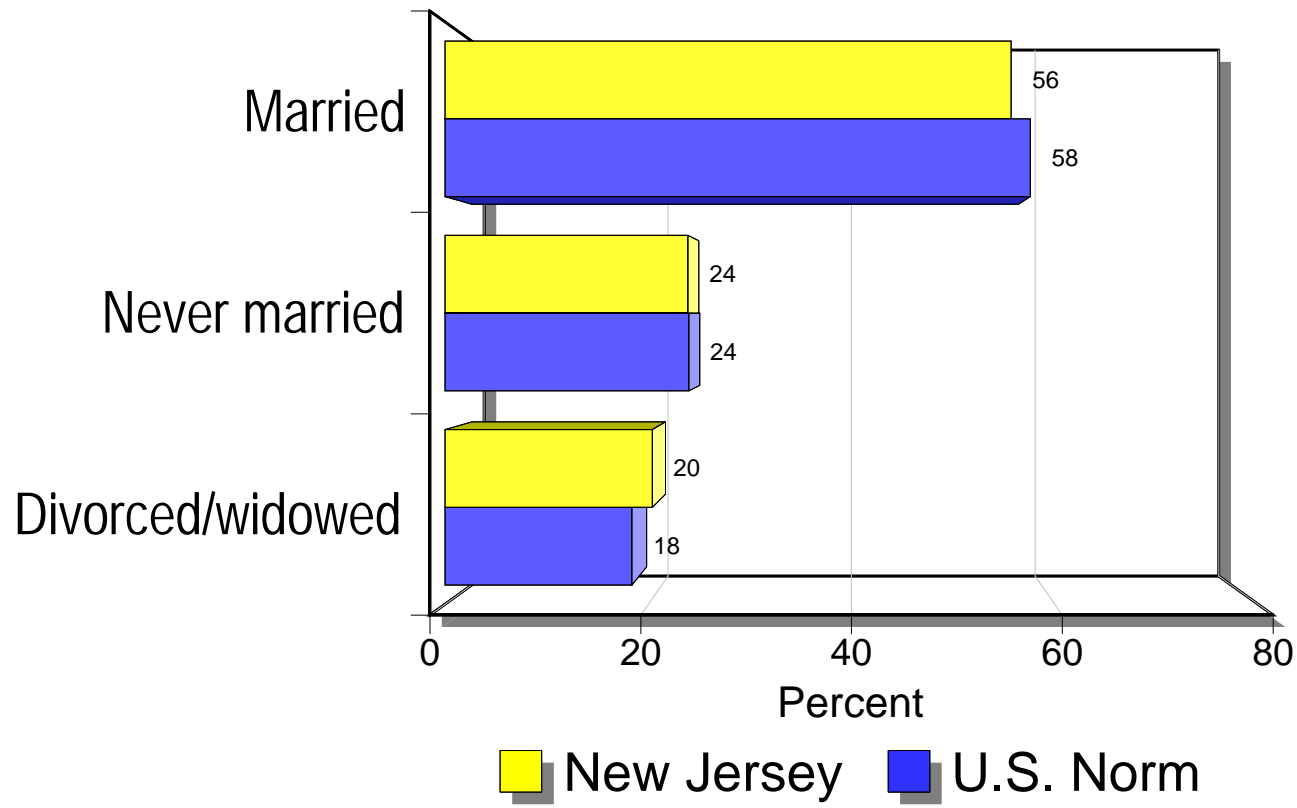
Base: Overnight Pleasure Trips



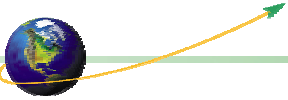
Marital Status



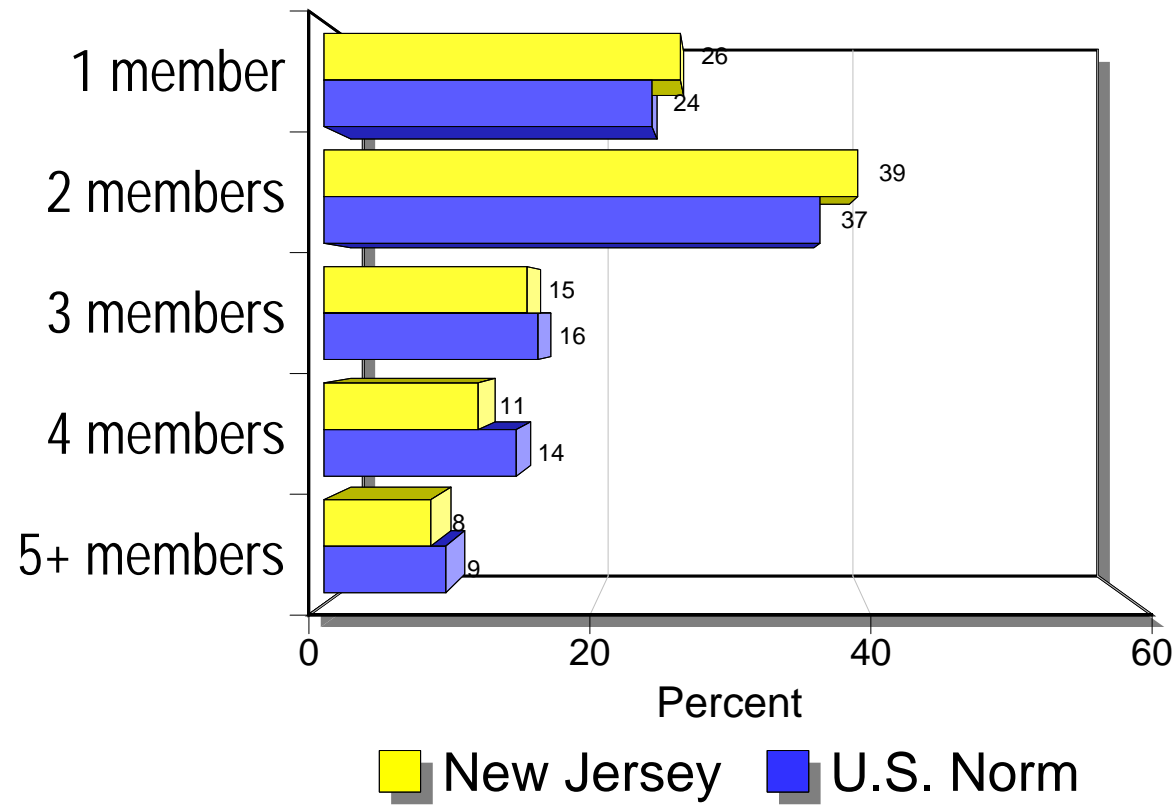
Base: Overnight Pleasure Trips



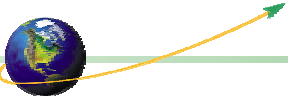
Household Size



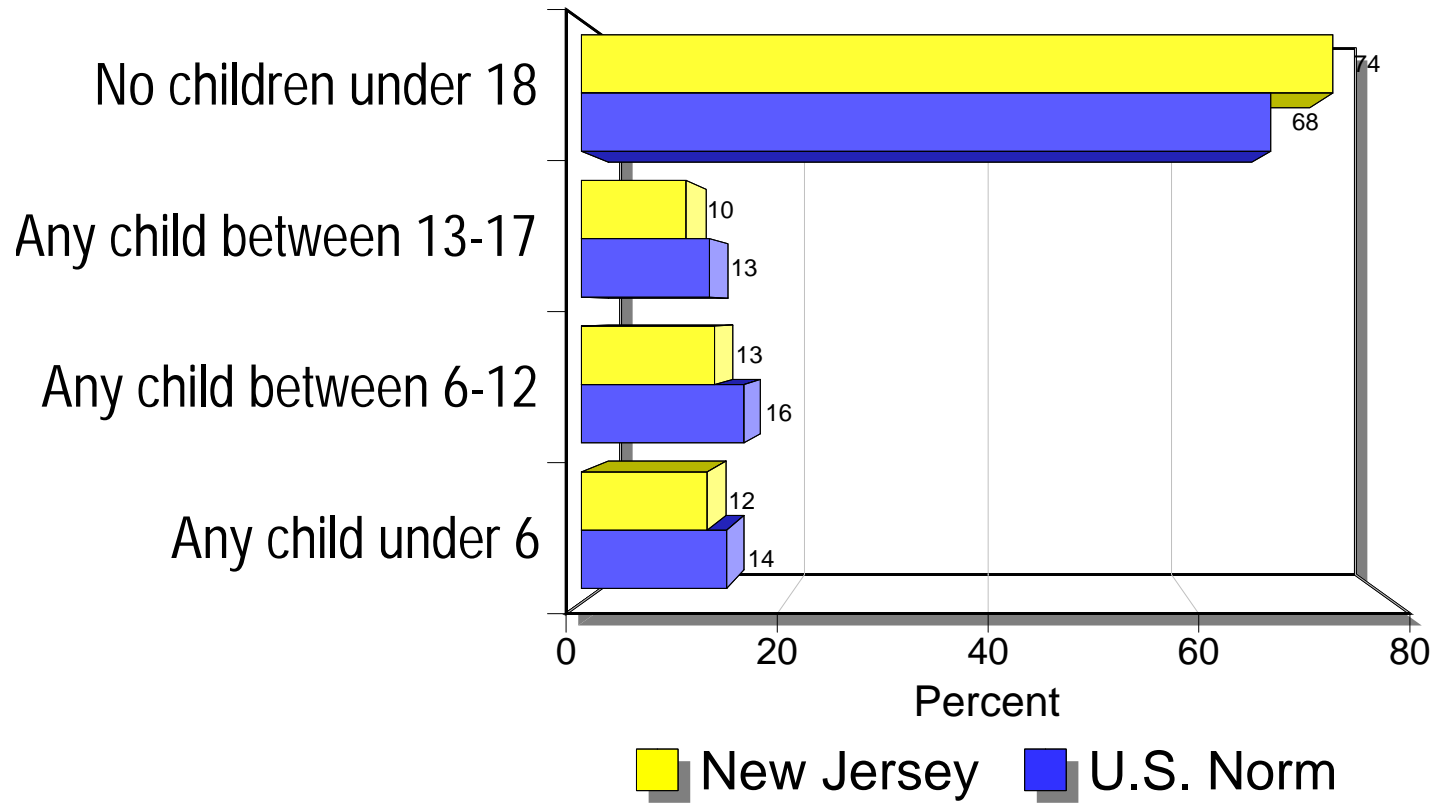
Base: Overnight Pleasure Trips



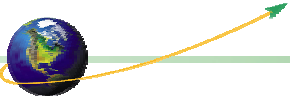
Children in Household



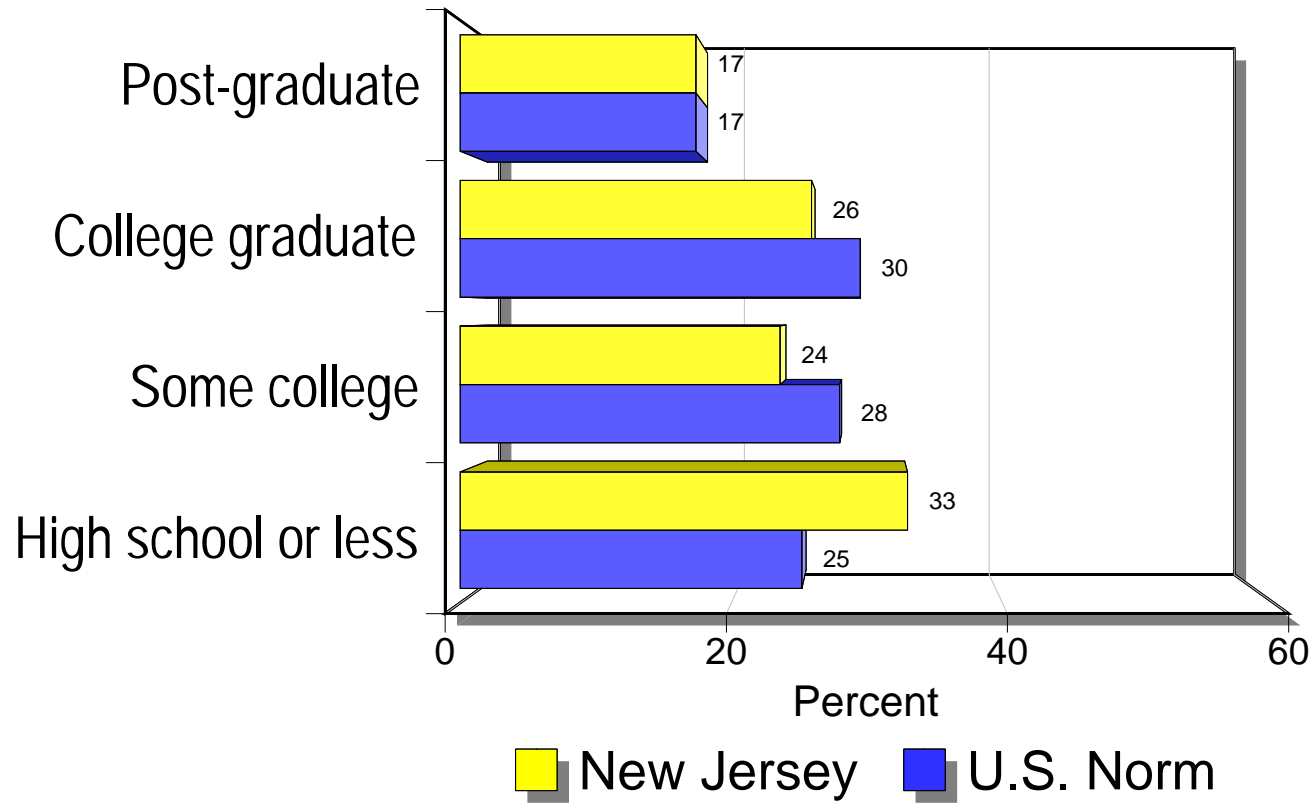
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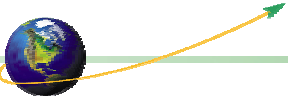
Education



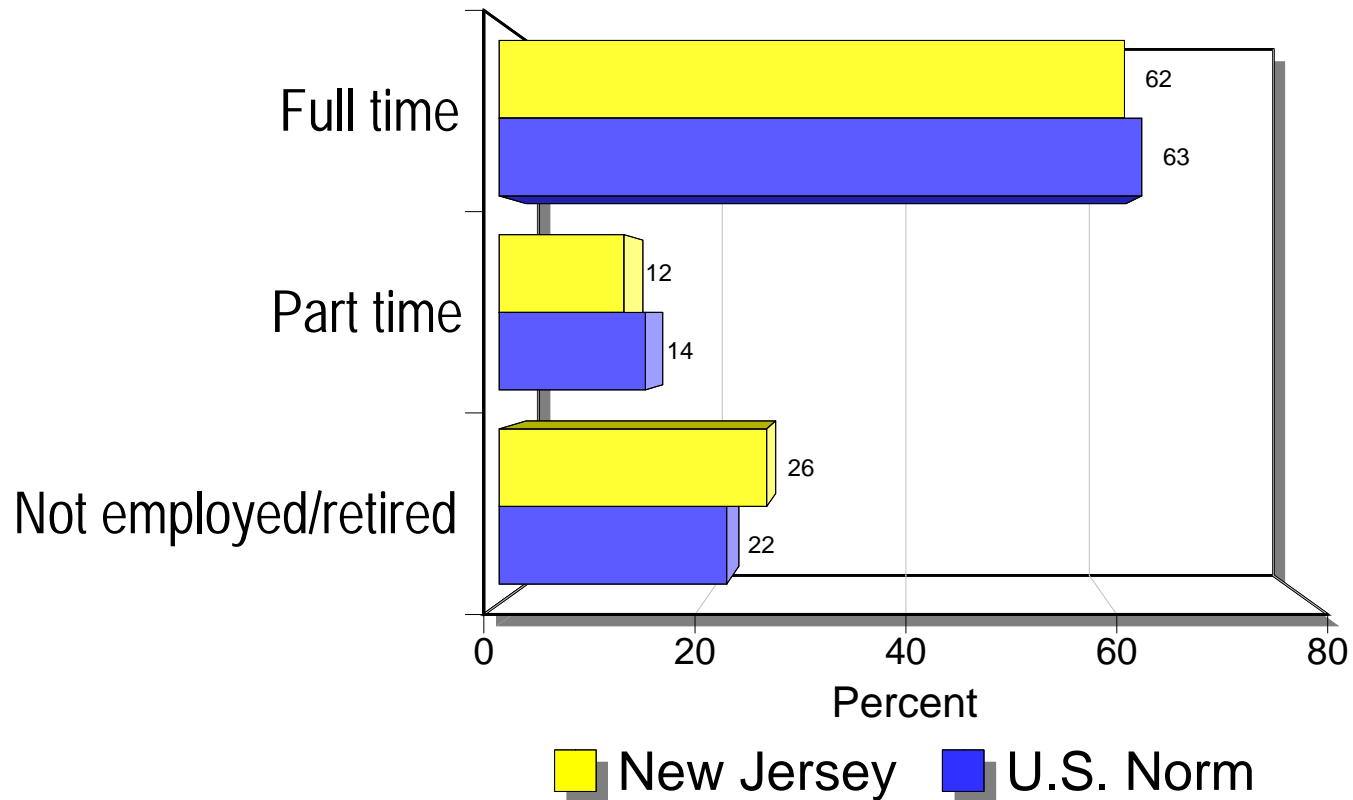
Base: Overnight Pleasure Trips



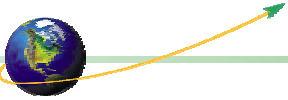
Employment



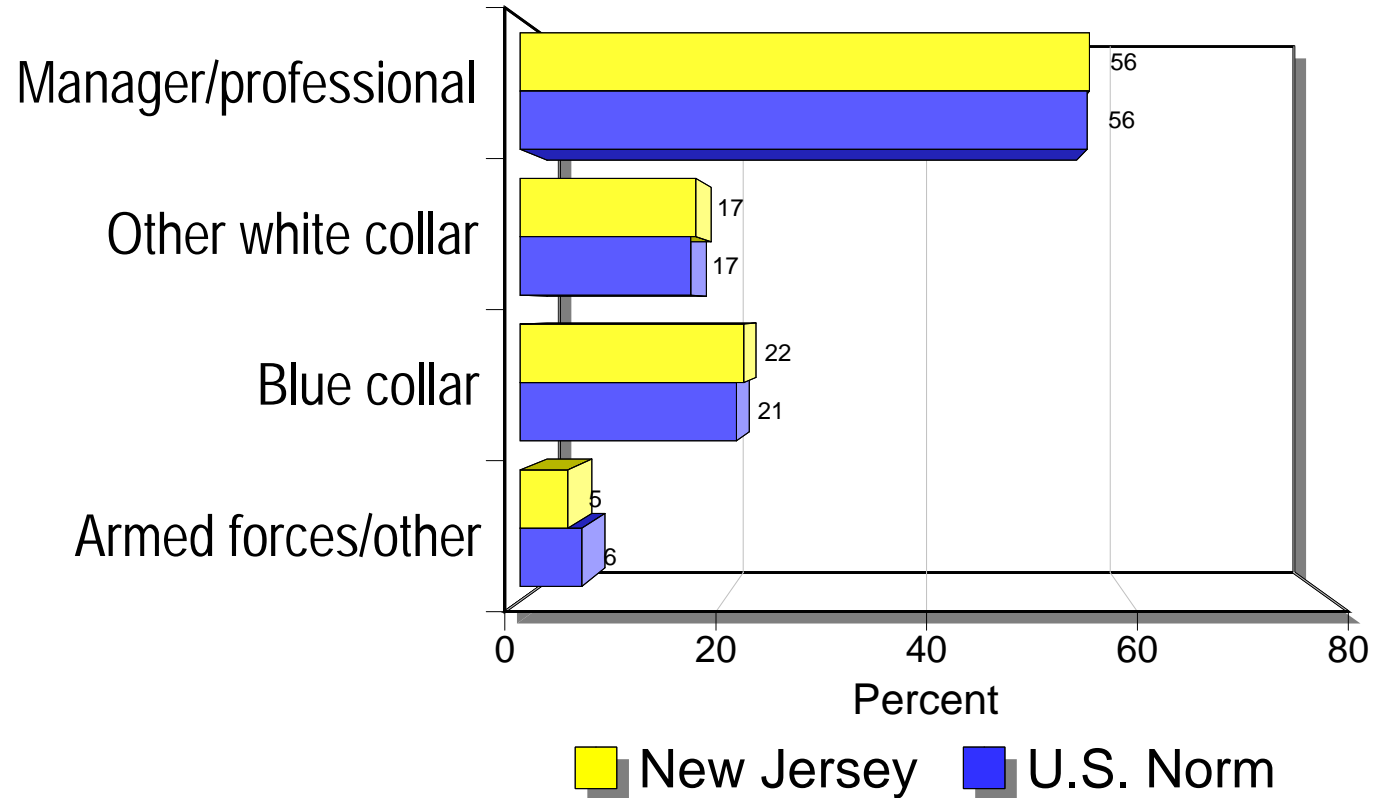
Base: Overnight Pleasure Trips



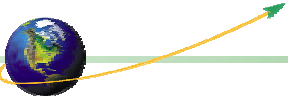
Occupation



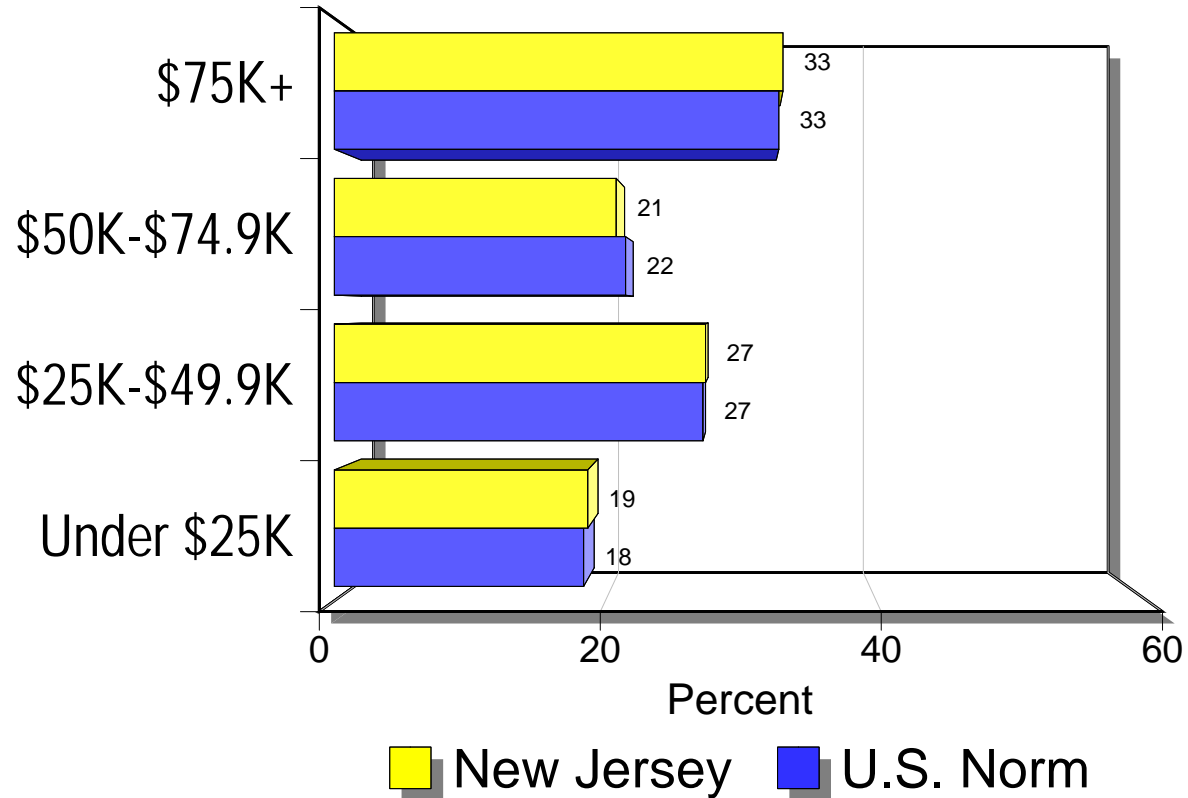
Base: Overnight Pleasure Trips by Those Employed



Income



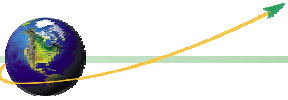
Base: Overnight Pleasure Trips



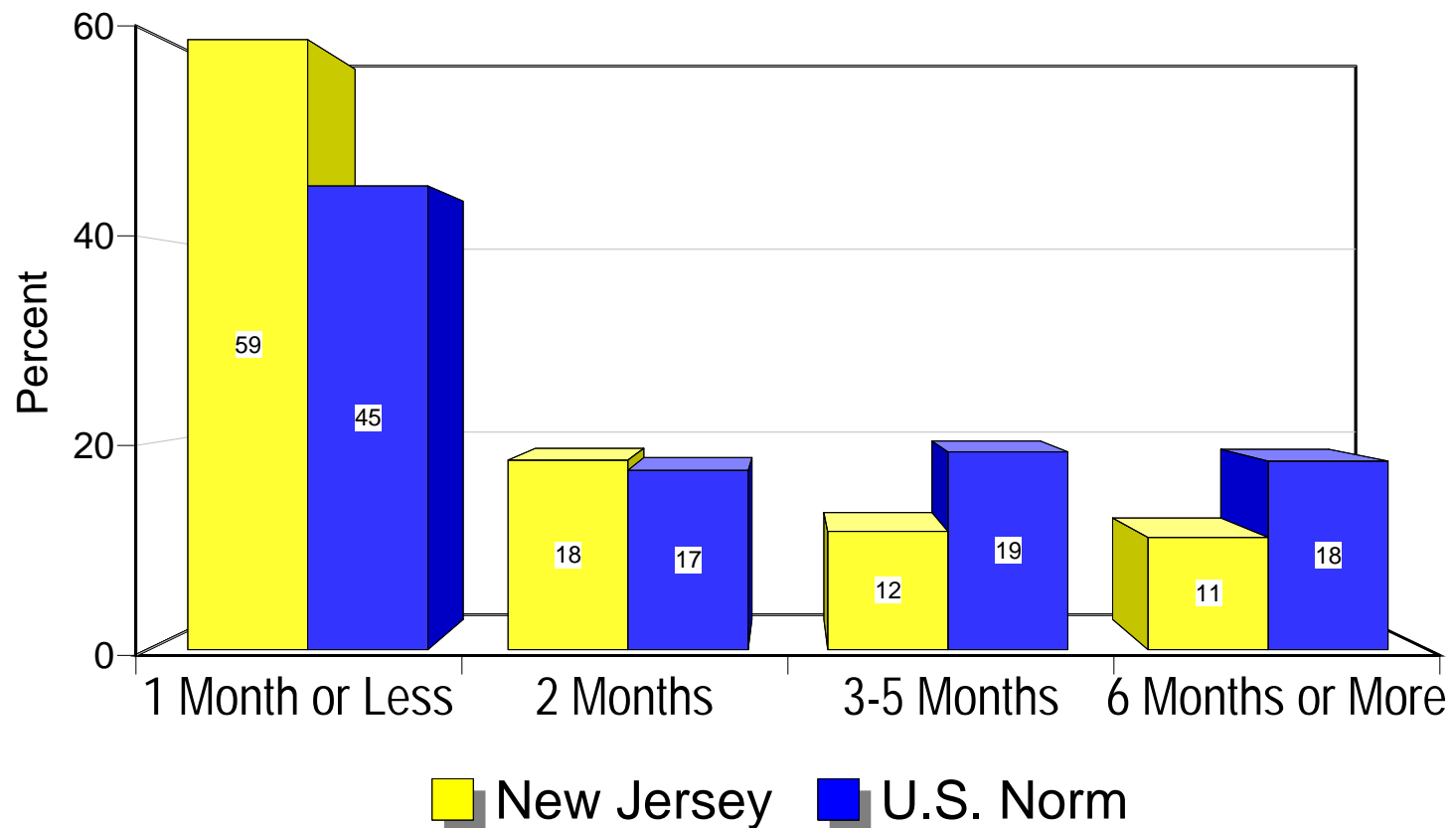


Trip Planning and Booking

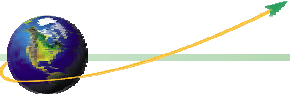
Planning Cycle



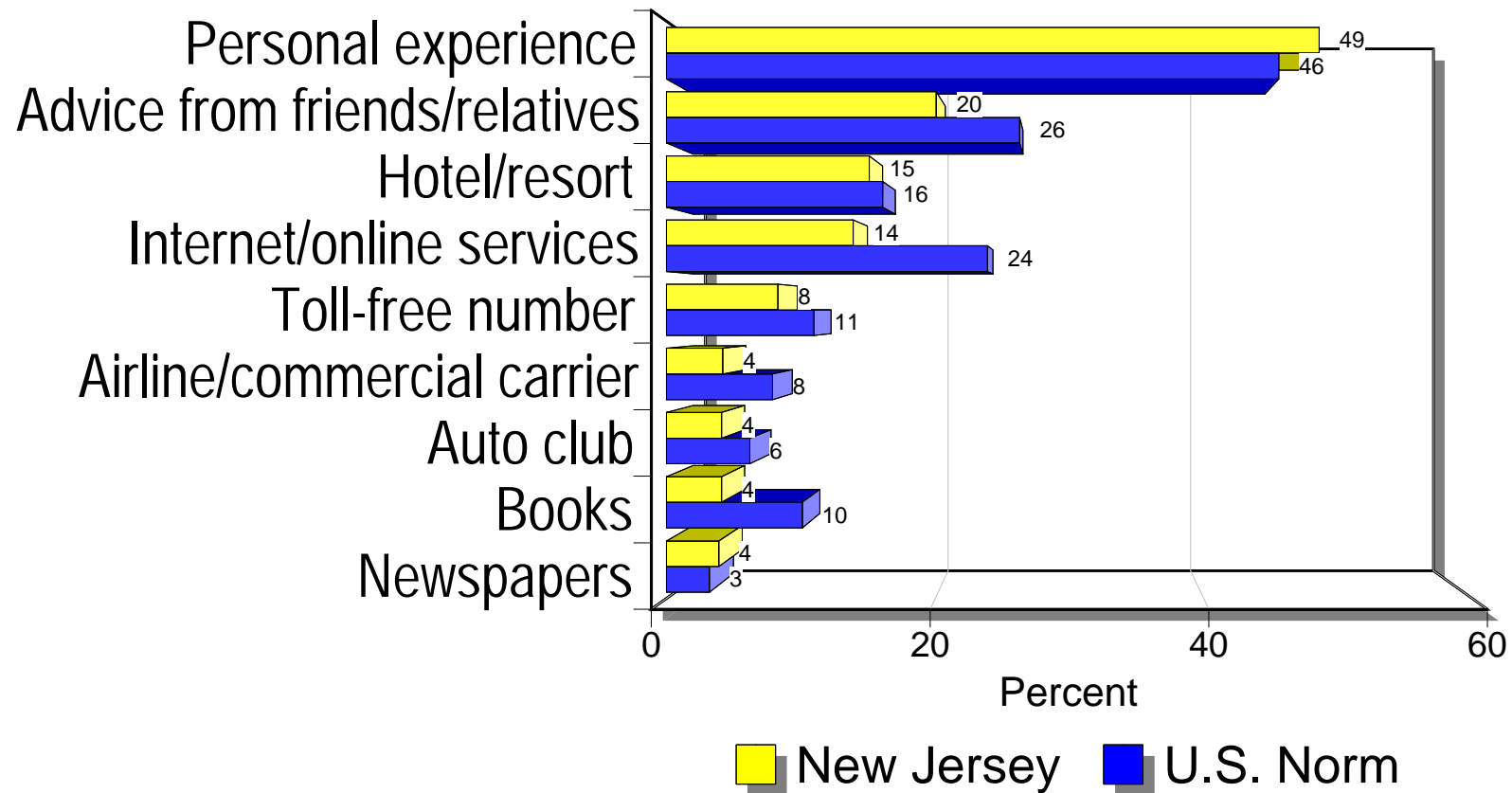
Base: Overnight Pleasure Trips



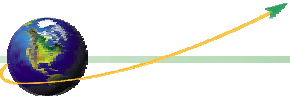
Information Sources Used for Planning



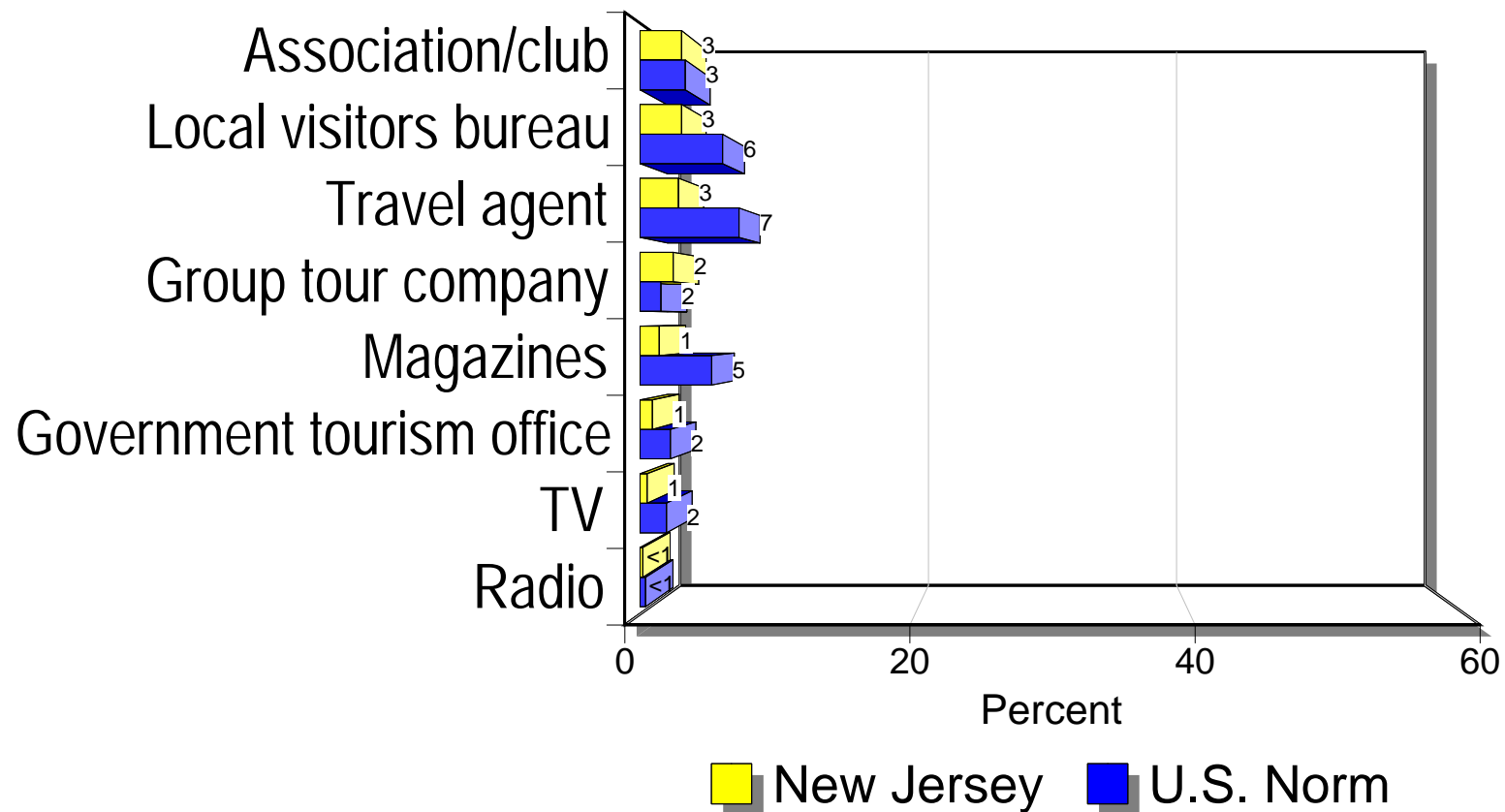
Base: Overnight Pleasure Trips



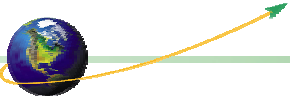
Information Sources Used for Planning (Cont'd)



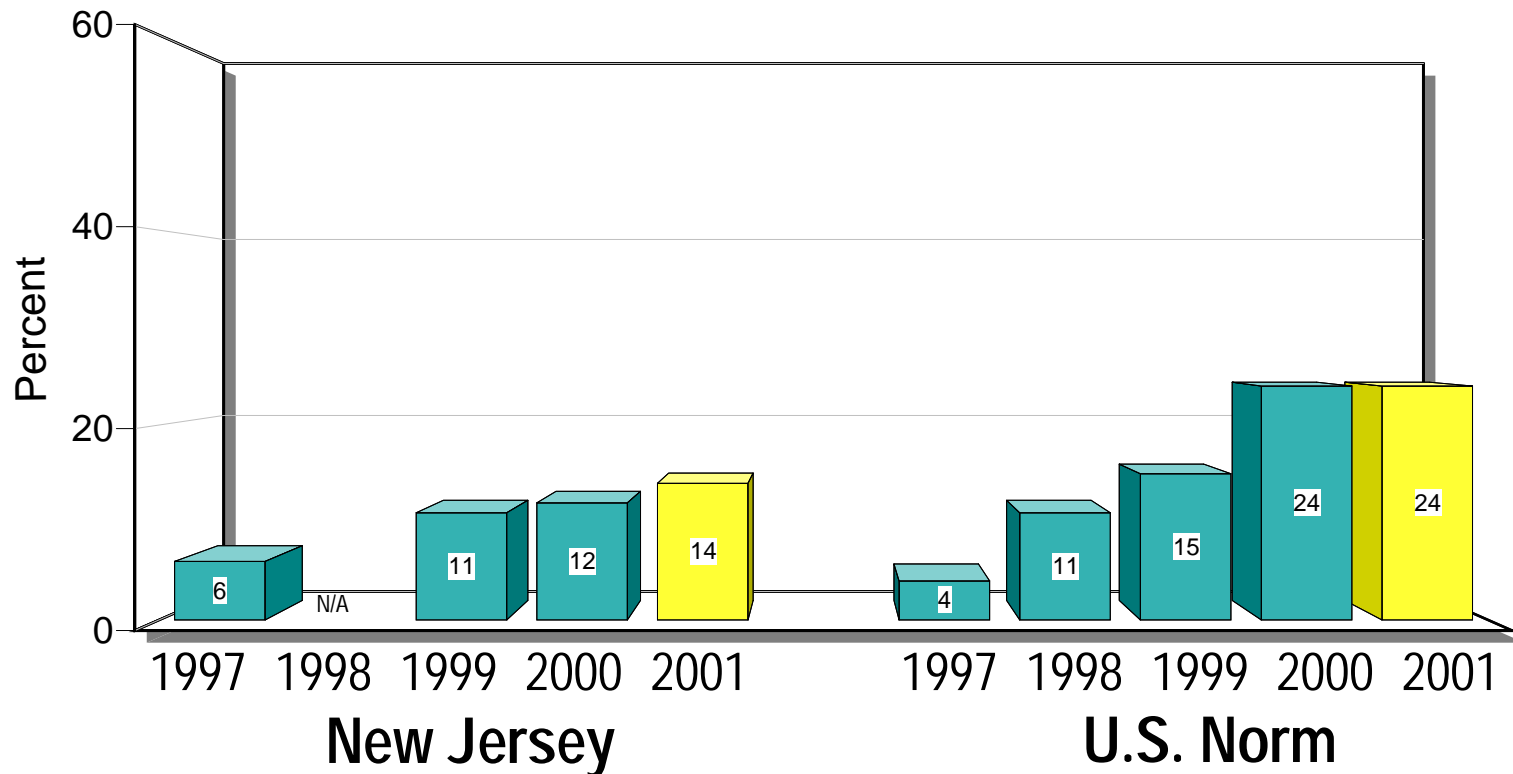
Base: Overnight Pleasure Trips



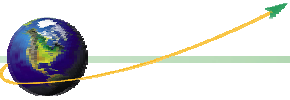
Use of the Internet for Trip Planning



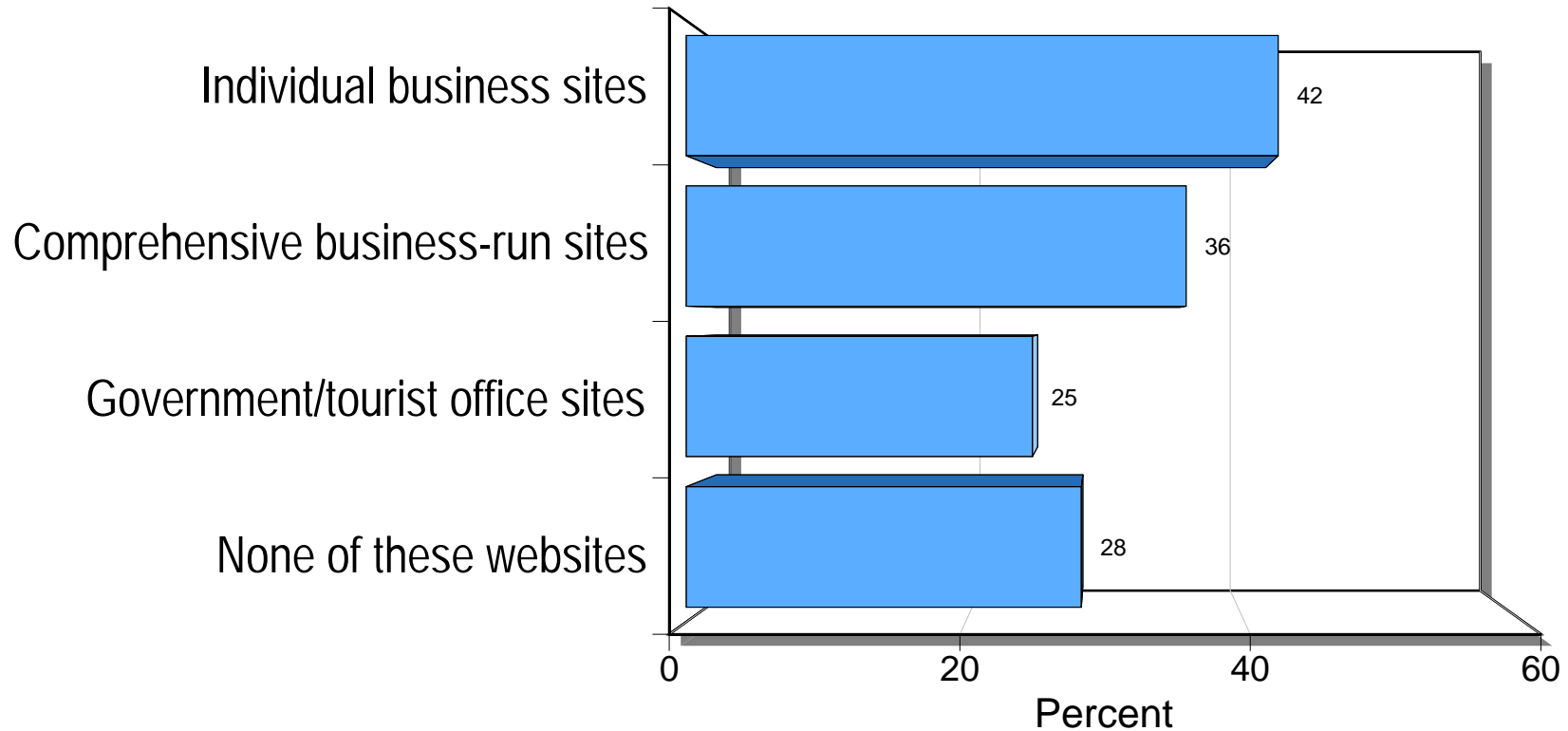
Base: Overnight Pleasure Trips



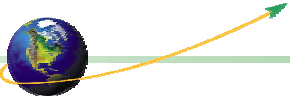
Type of Websites Used for Trip Planning



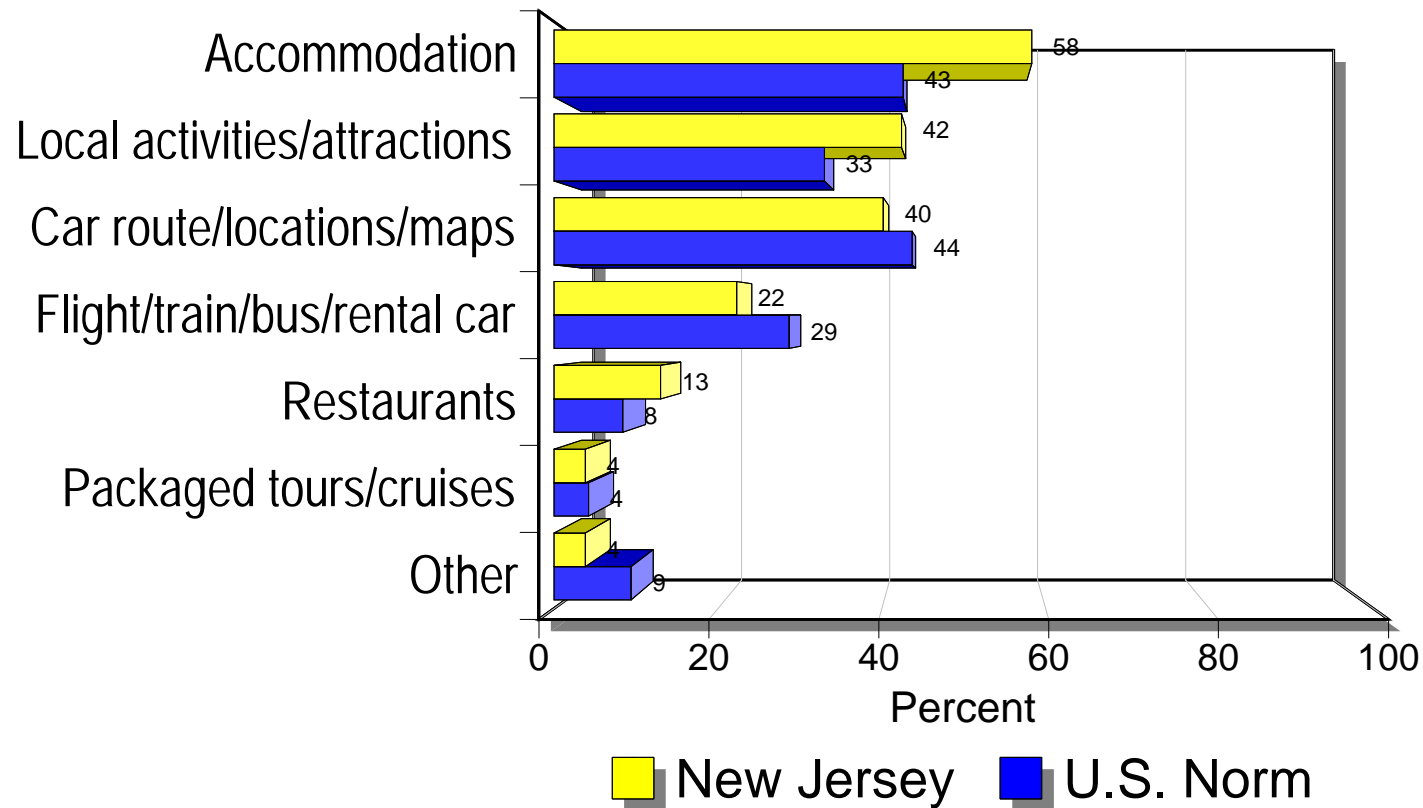
Base: Overnight Pleasure Trips by Those who Used the Internet to Plan



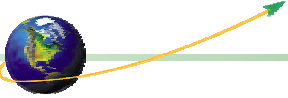
Elements of Trip Planned Using Websites



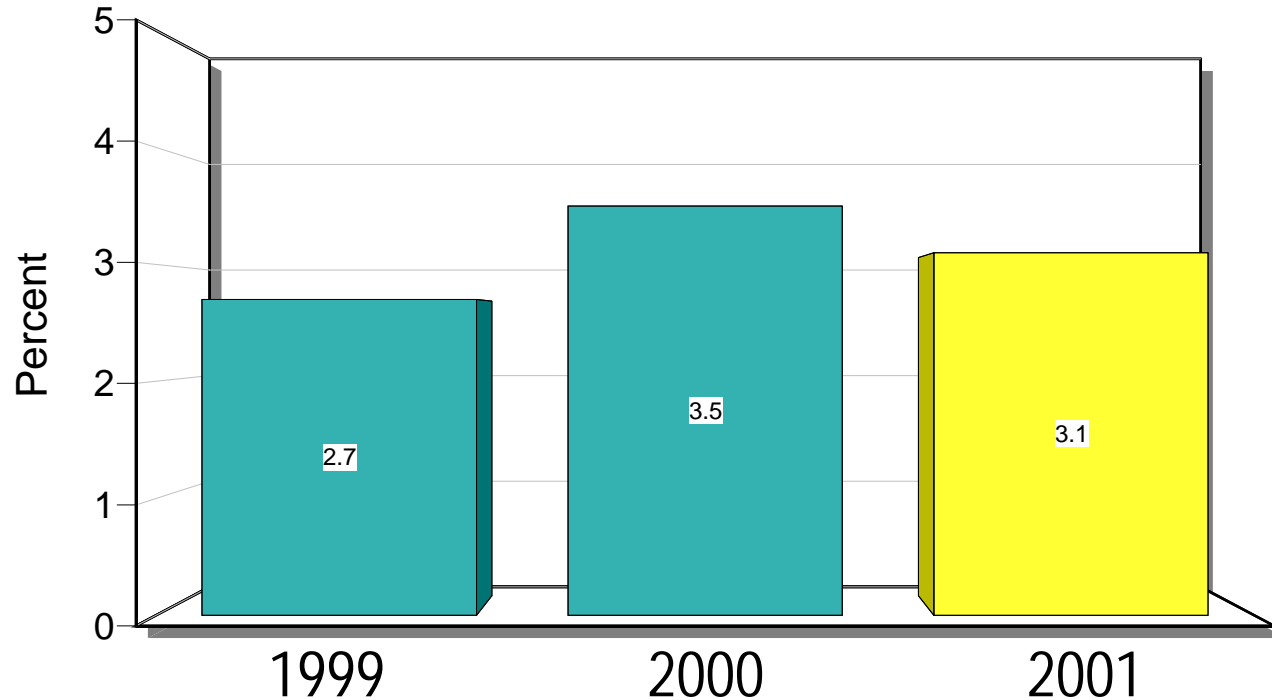
Base: Overnight Pleasure Trips by Those who Used the Internet to Plan



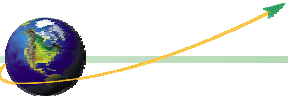
Visited www.visitnj.org Website When Planning Trip



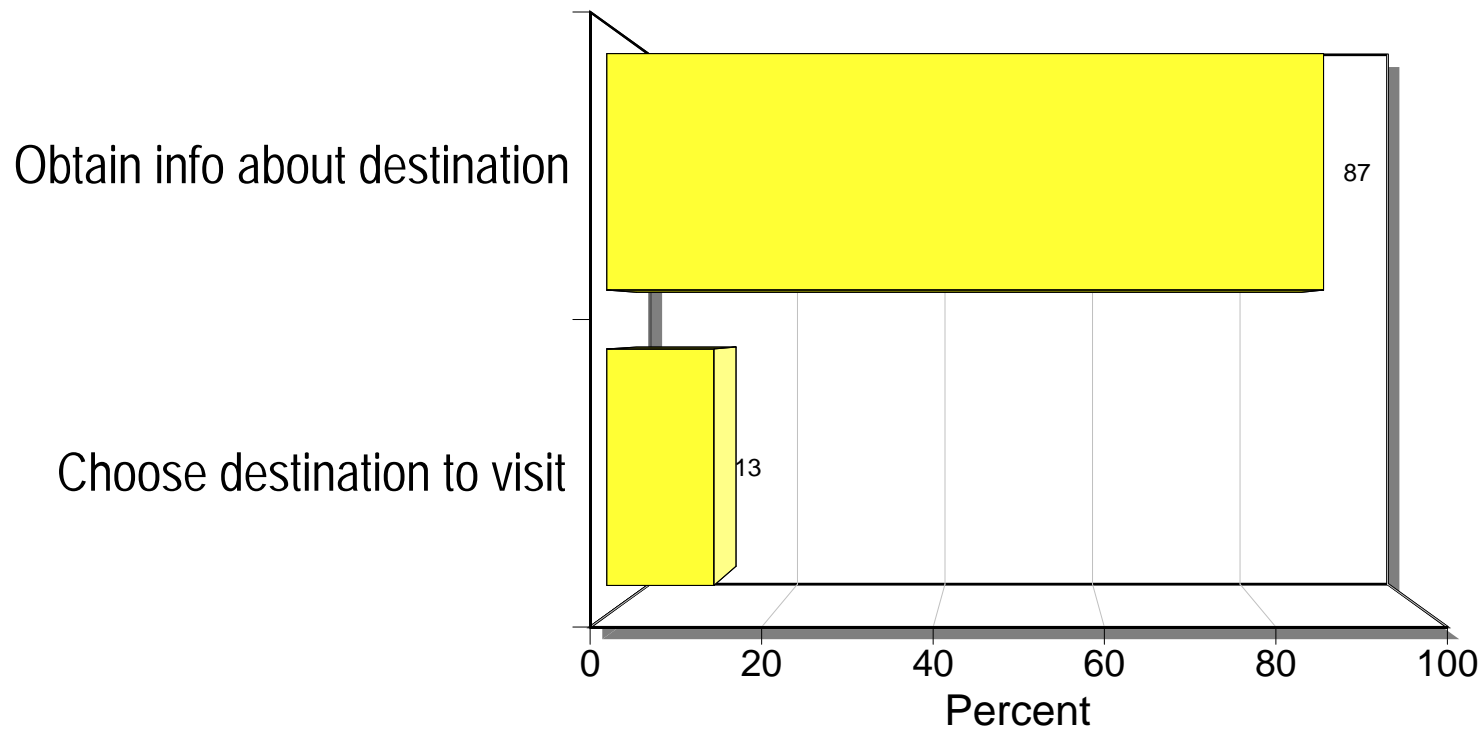
Base: Overnight Pleasure Trips



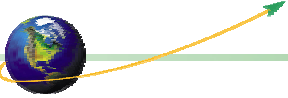
Reason for Using www.visitnj.org



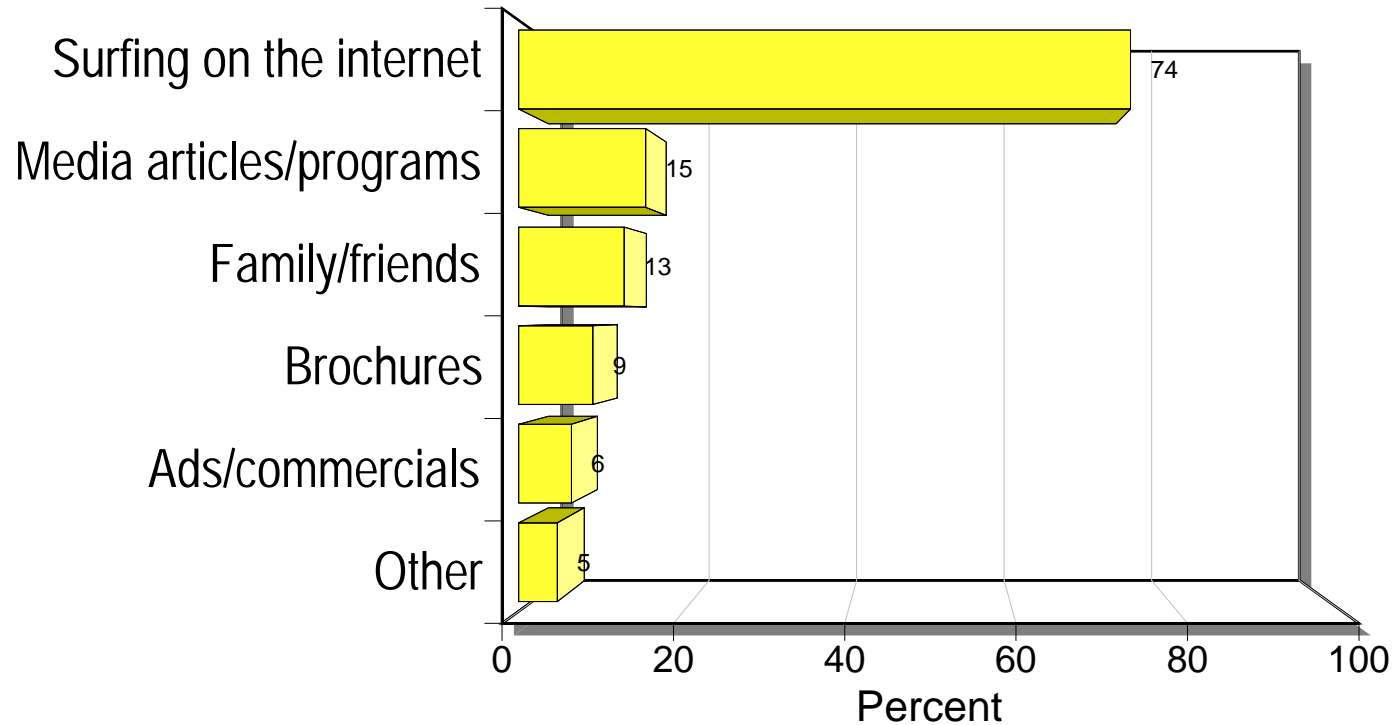
Base: Overnight Pleasure Trips by Those Who Visited www.visitnj.org



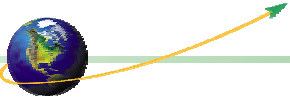
Source of Awareness of www.visitnj.org



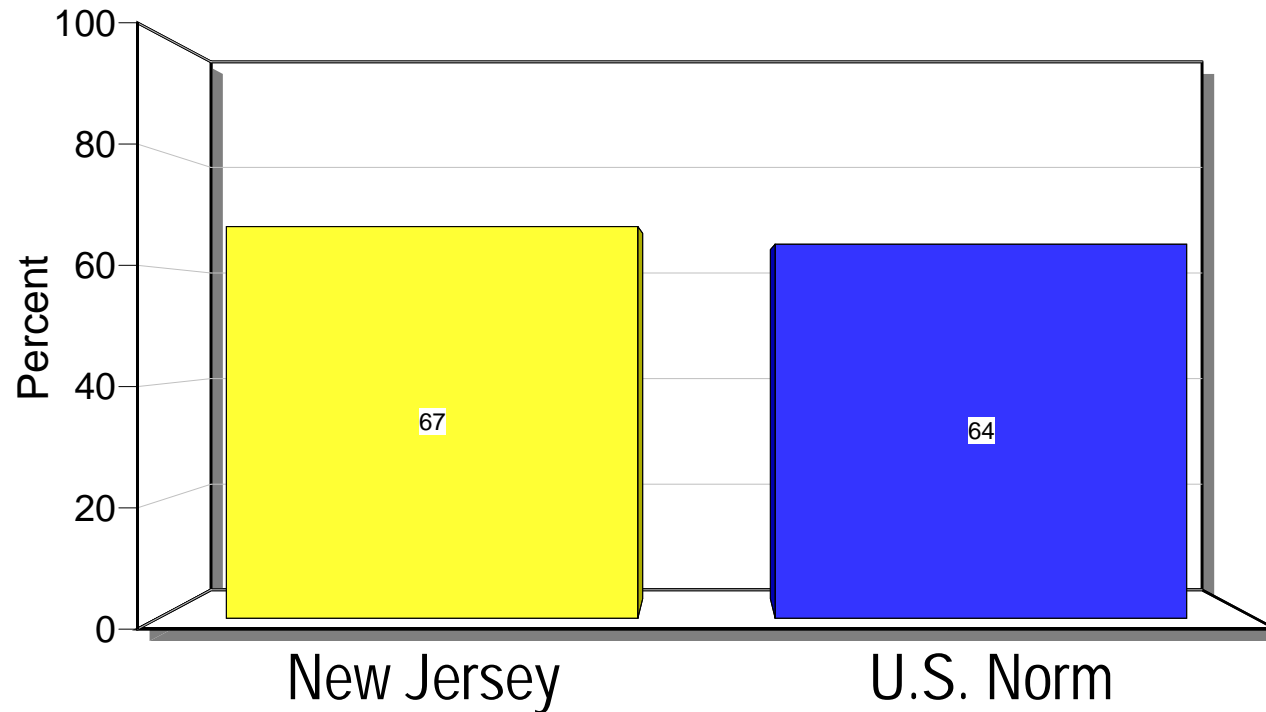
Base: Overnight Pleasure Trips by Those Who Visited www.visitnj.org



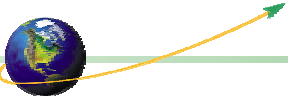
Percent Who Booked In Advance



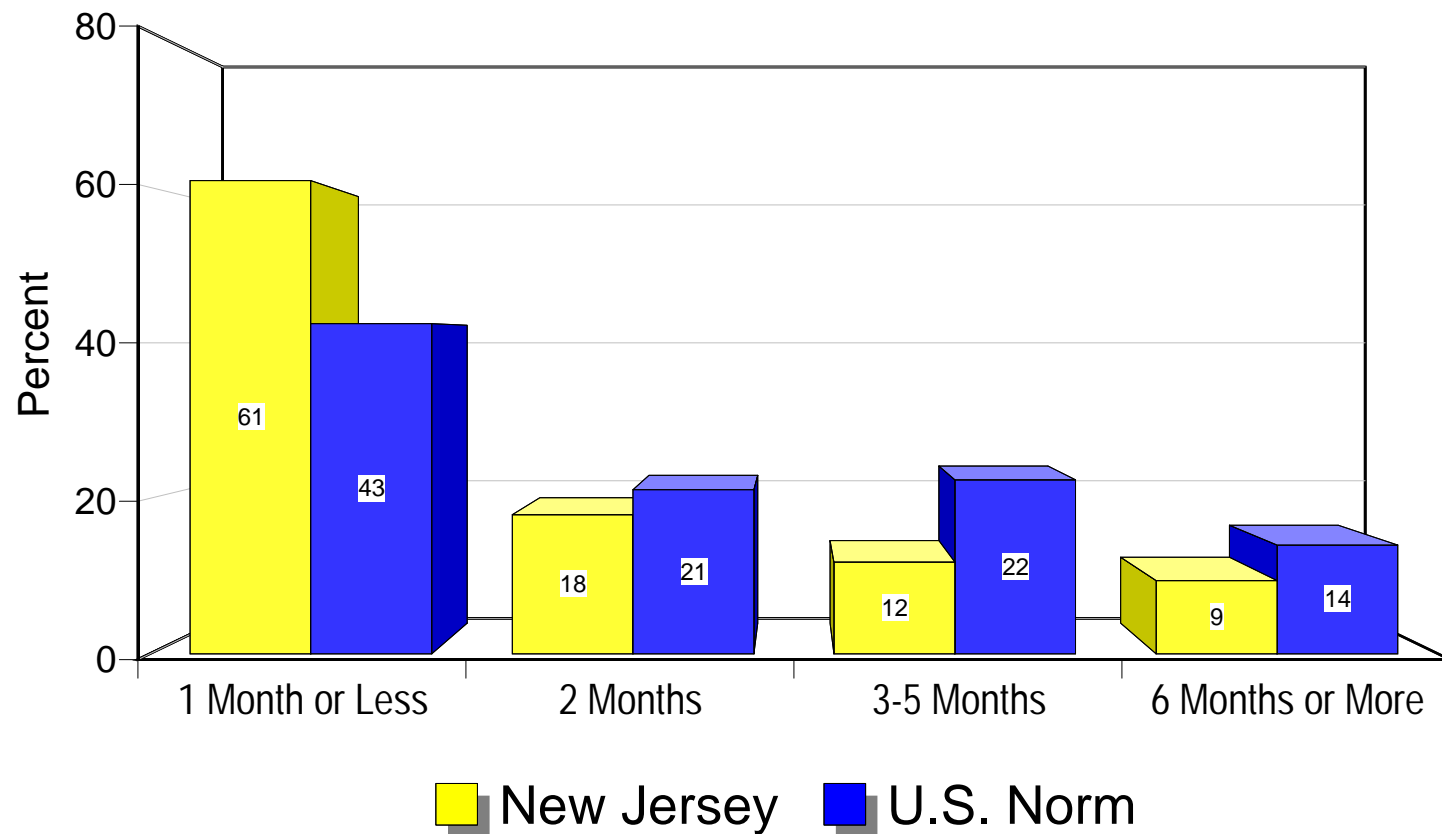
Base: Overnight Pleasure Trips



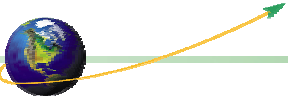
Booking Cycle



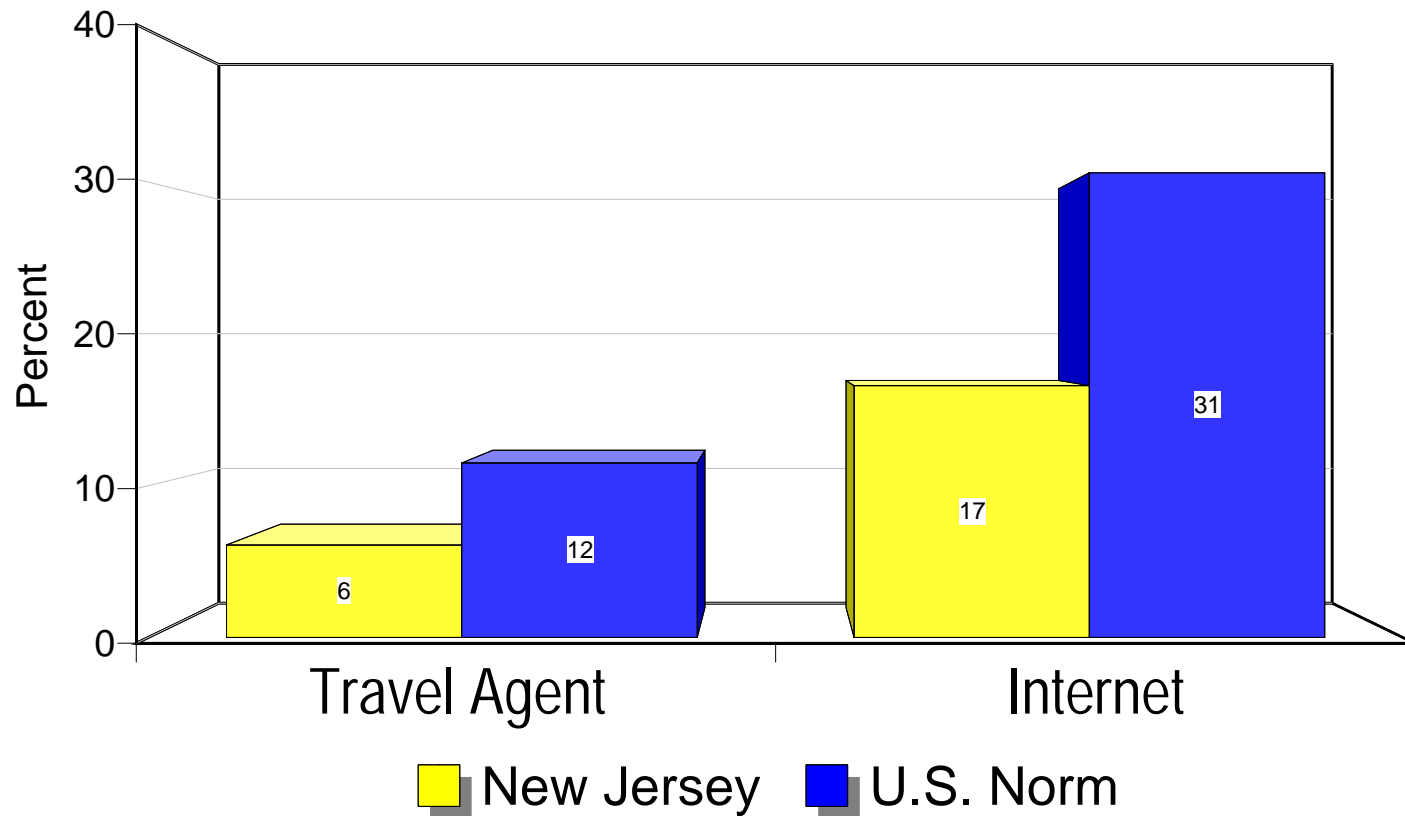
Base: Overnight Pleasure Trips Booked in Advance



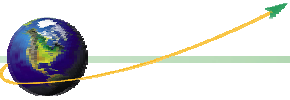
Method of Booking



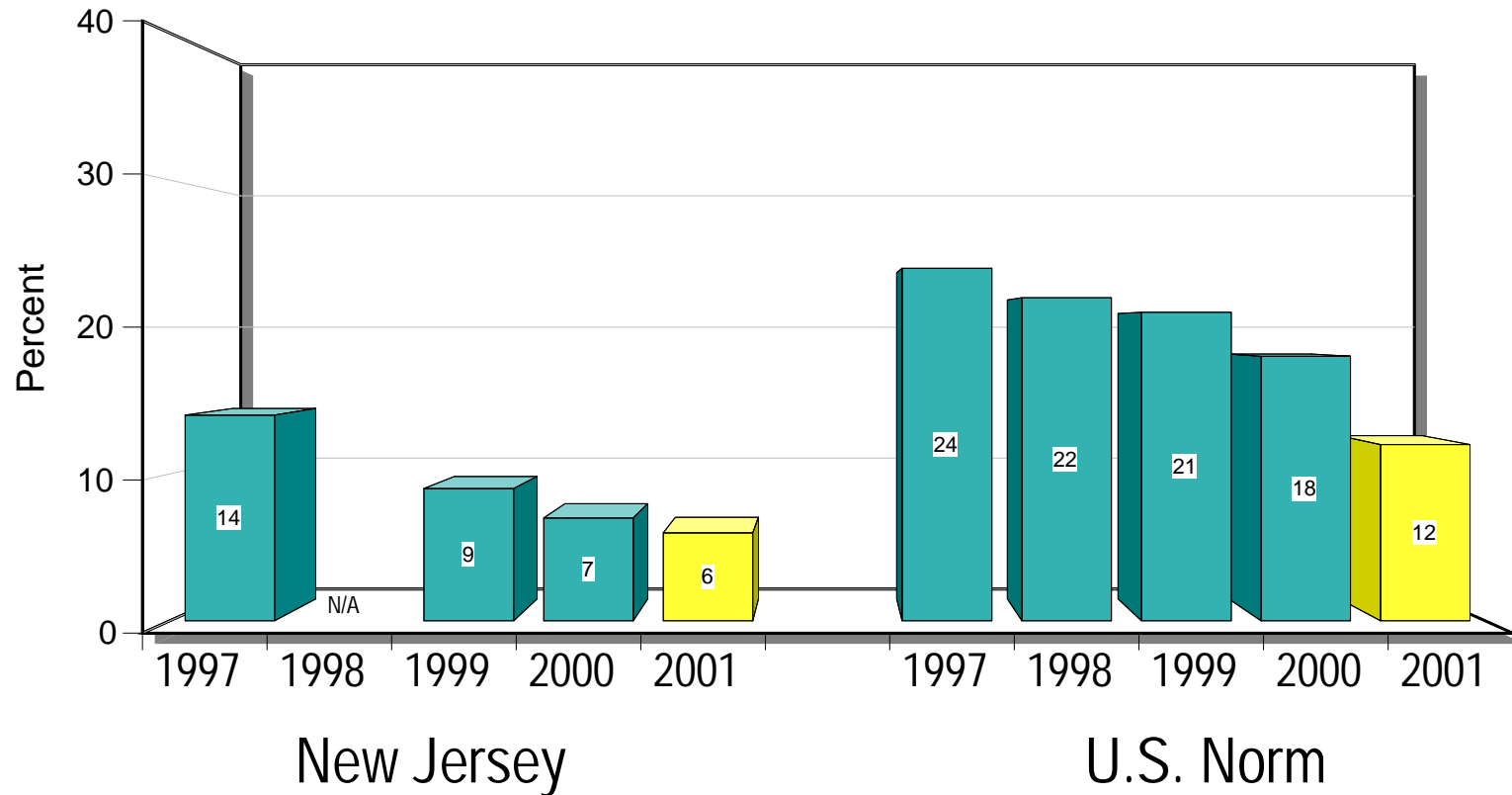
Base: Overnight Pleasure Trips Booked in Advance



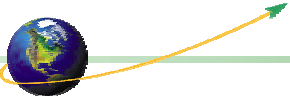
Use of Travel Agent for Trip Booking



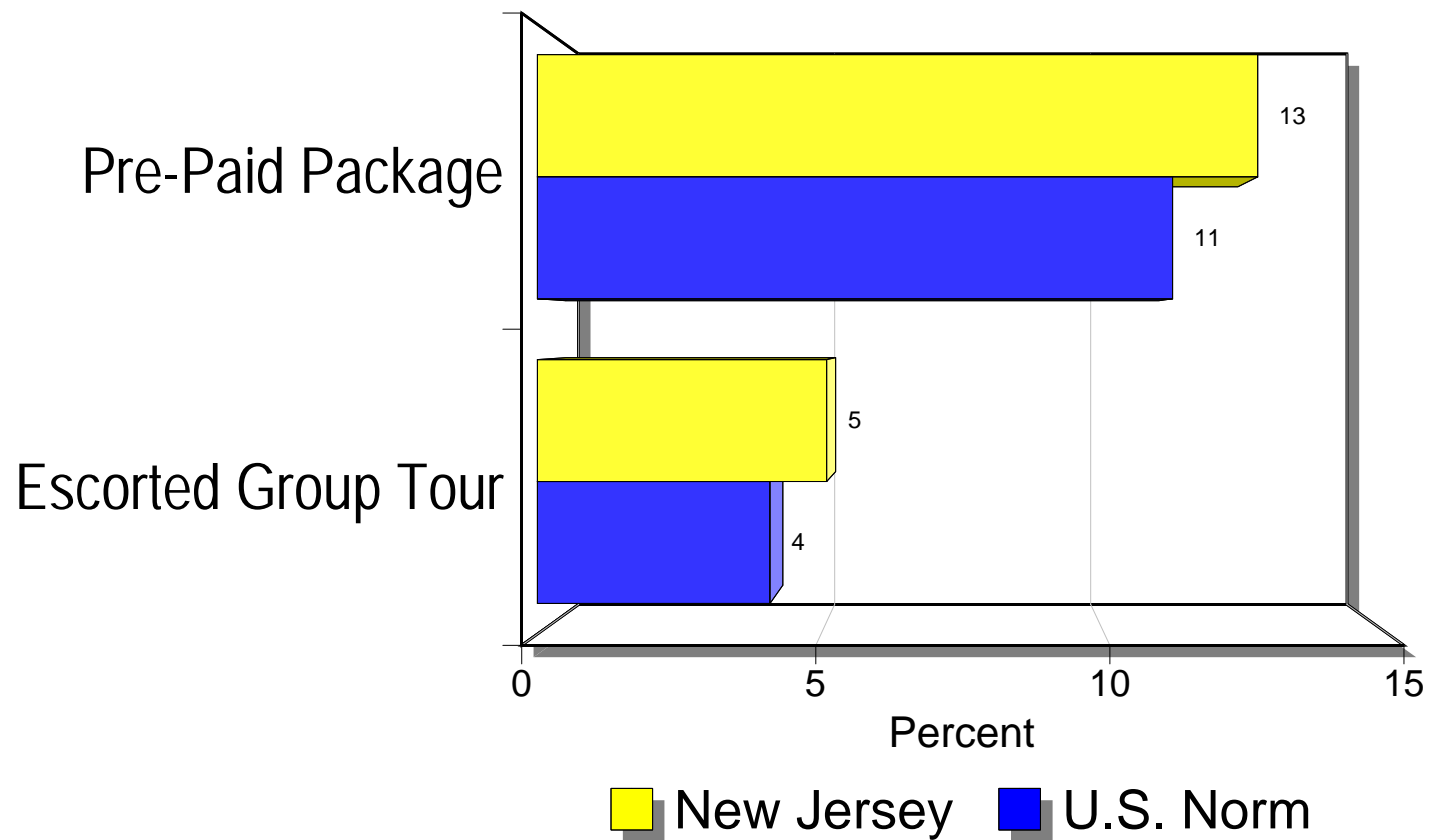
Base: Overnight Pleasure Trips Booked in Advance



Use of Vacation Packages and Group Travel



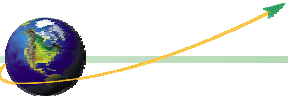
Base: Overnight Pleasure Trips



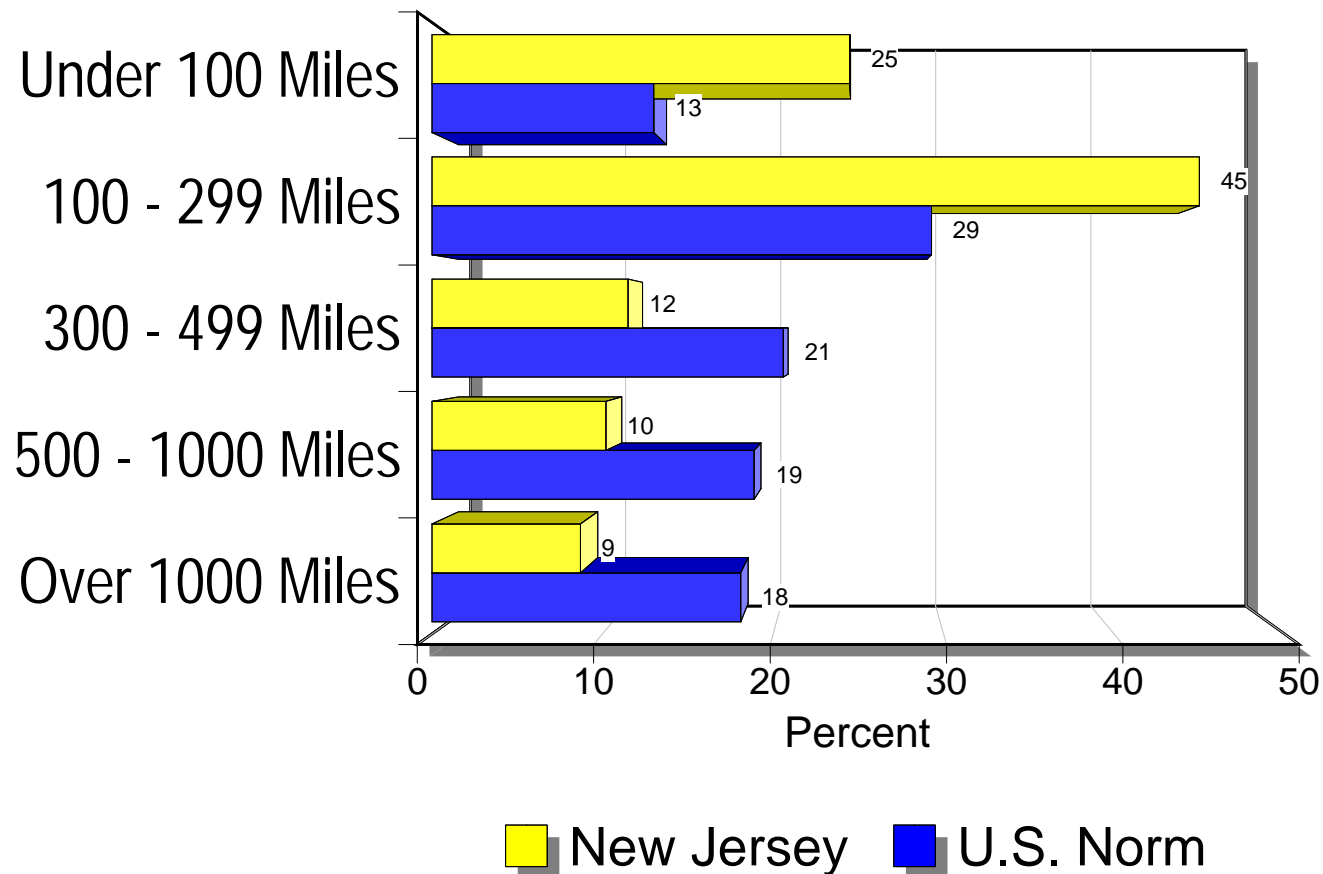


Pleasure Trip Characteristics

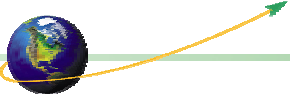
Distance Traveled



Base: Overnight Pleasure Trips



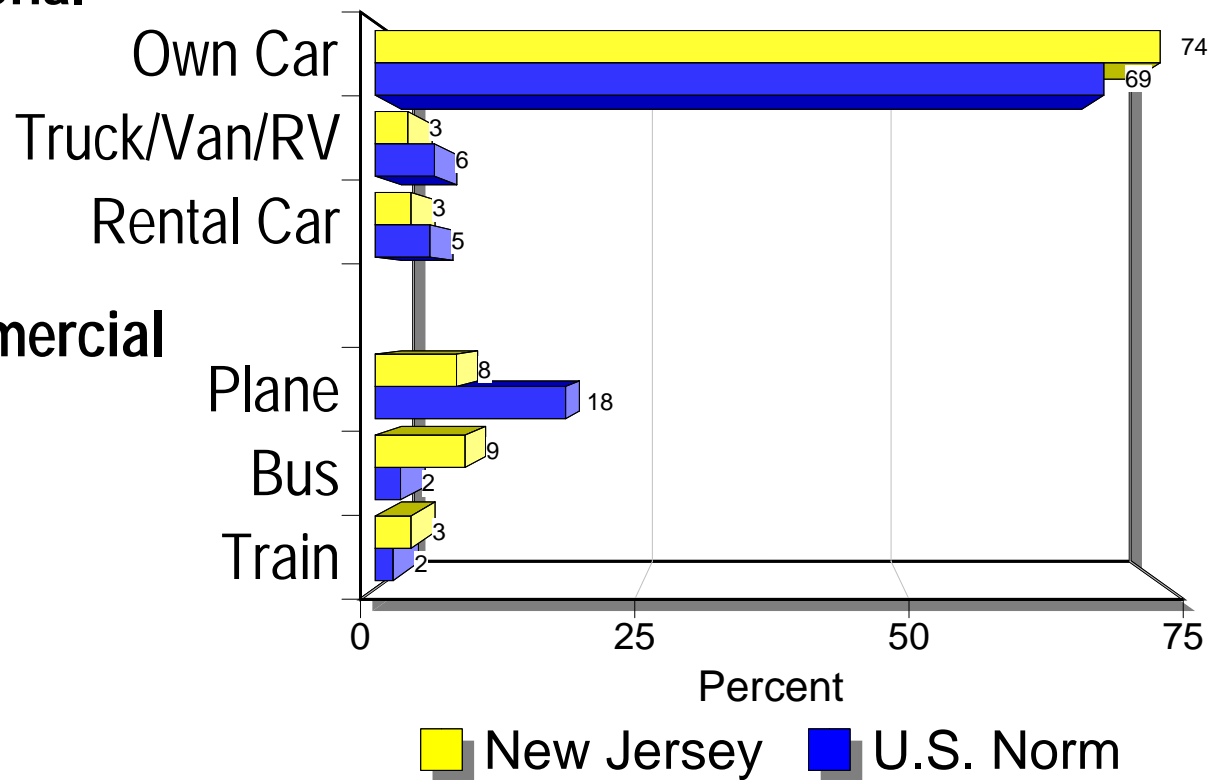
Transportation Used to Enter New Jersey



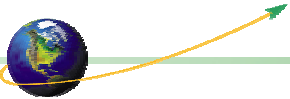
Base: Overnight Pleasure Trips

Personal

Commercial

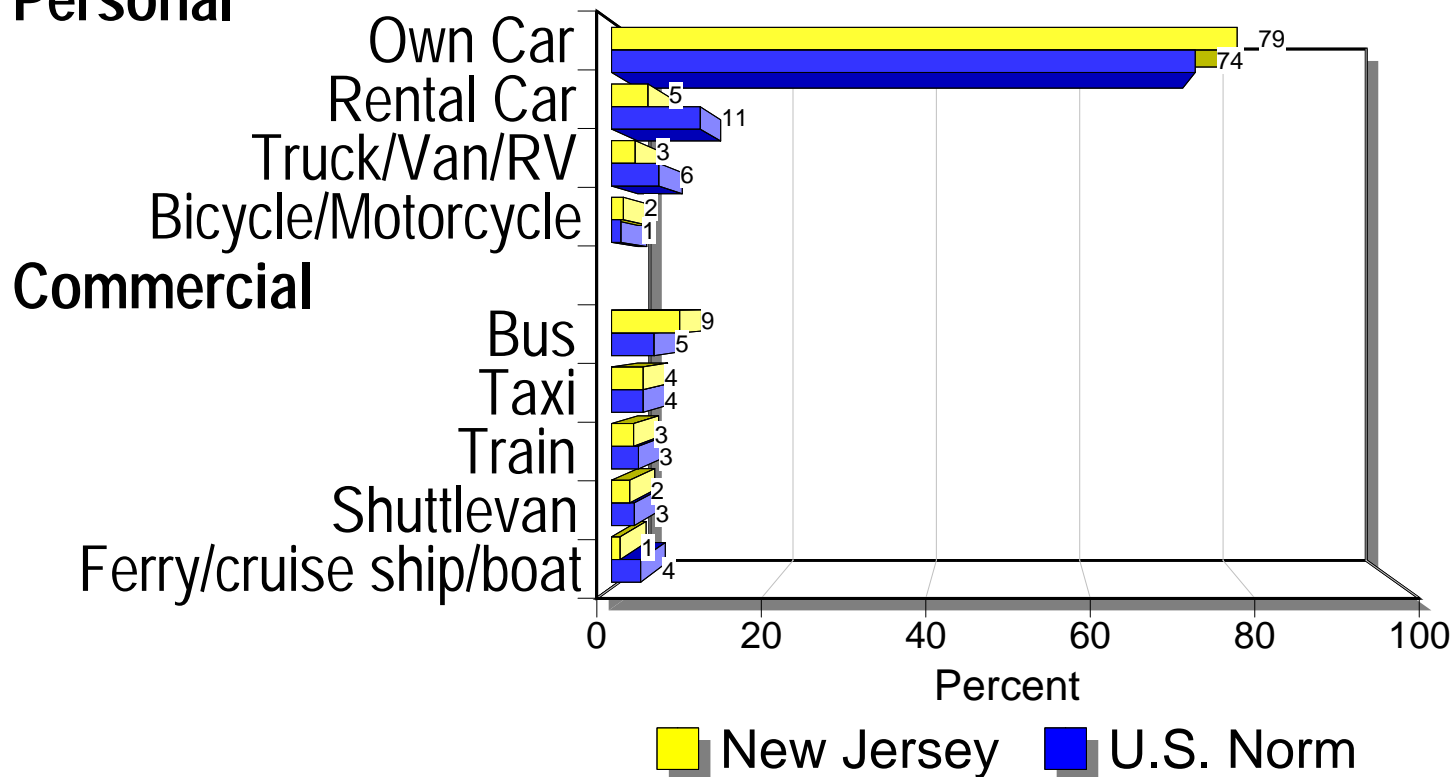


Transportation Used Inside New Jersey

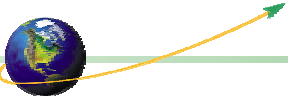


Base: Overnight Pleasure Trips

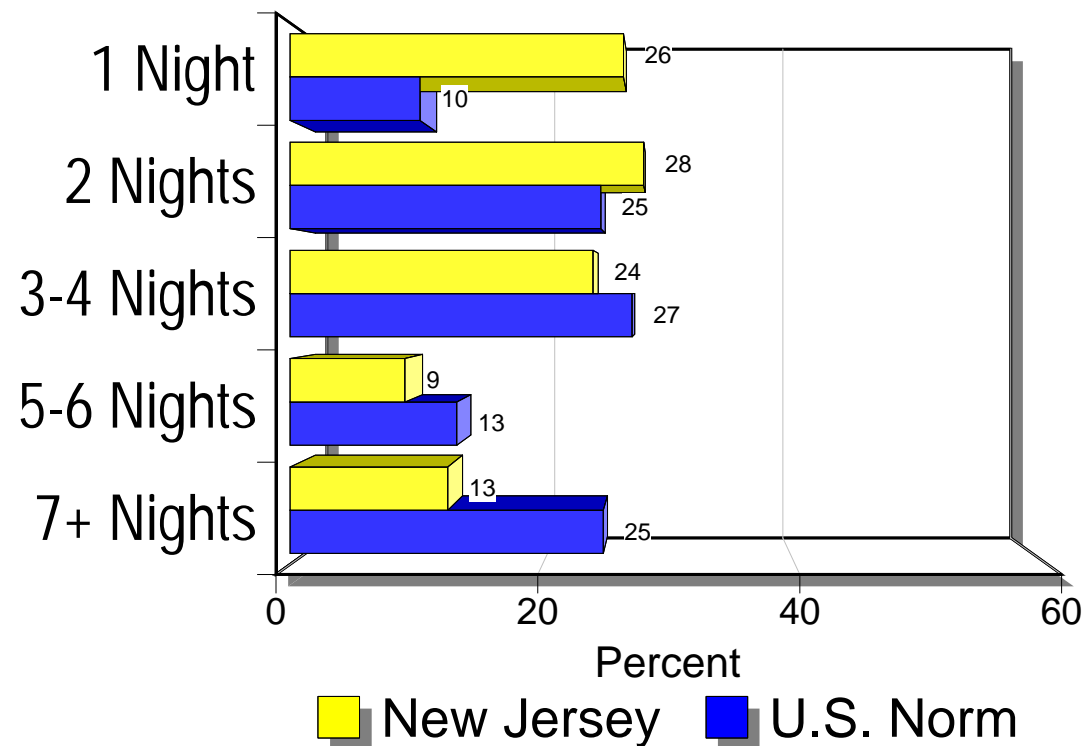
Personal



Total Nights Away

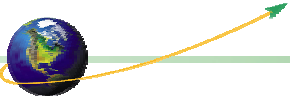


Base: Overnight Pleasure Trips

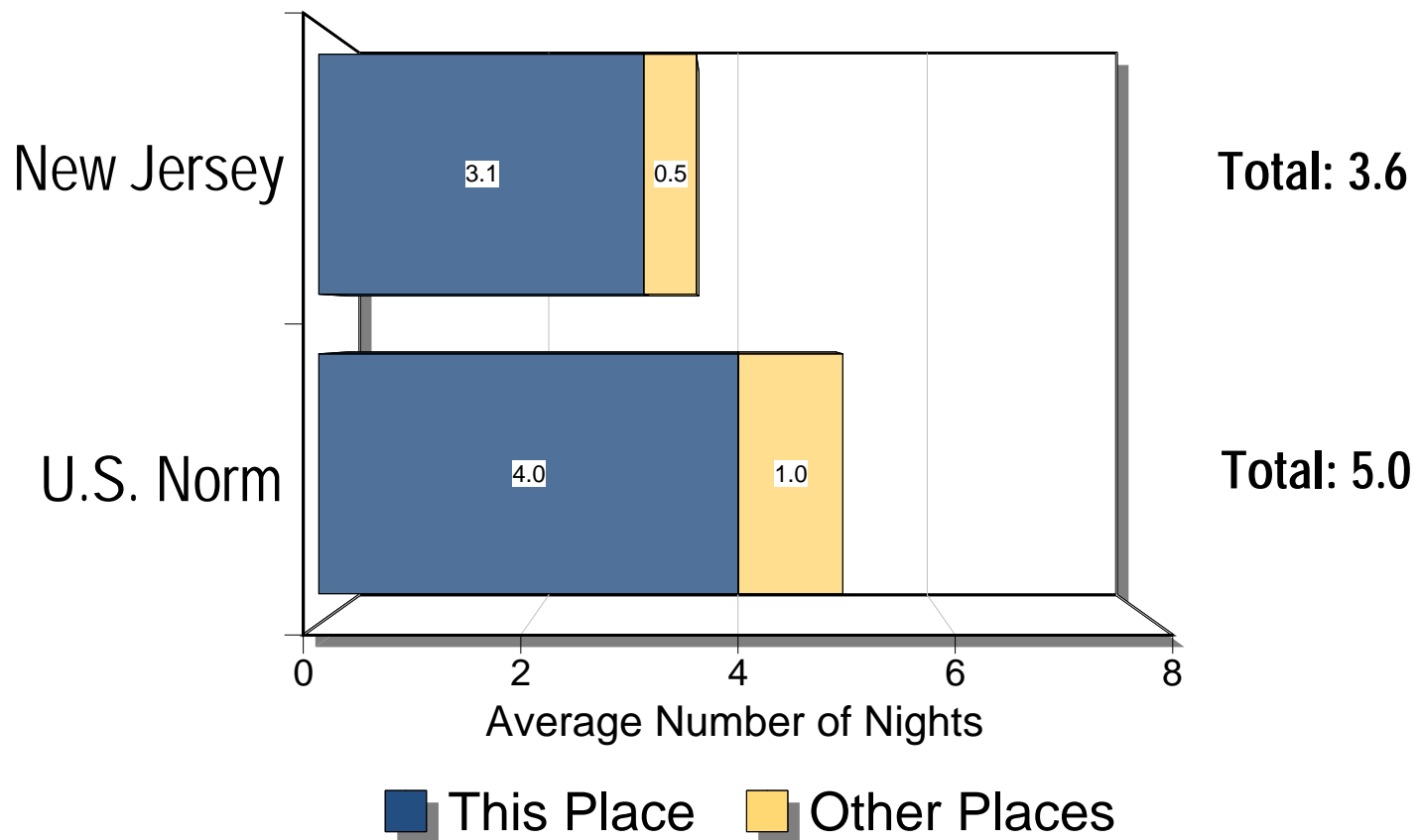


	<u>New Jersey</u>	<u>U.S. Norm</u>
Average Number of Nights Away	3.6	5.0

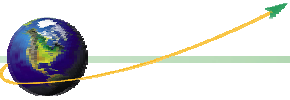
Length of Stay



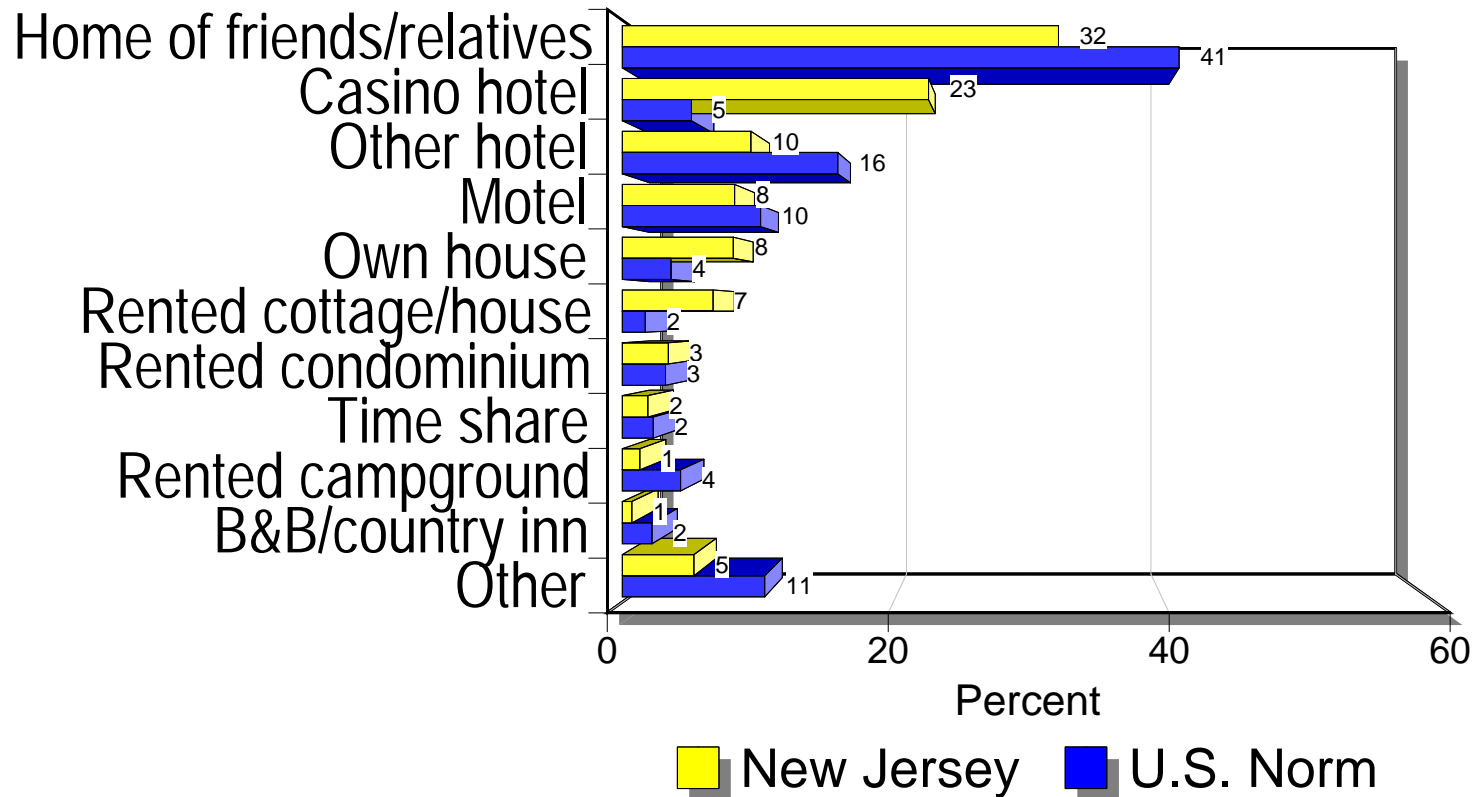
Base: Overnight Pleasure Trips



Accommodations* Used

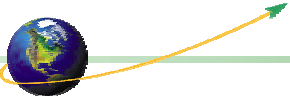


Base: Overnight Pleasure Trips

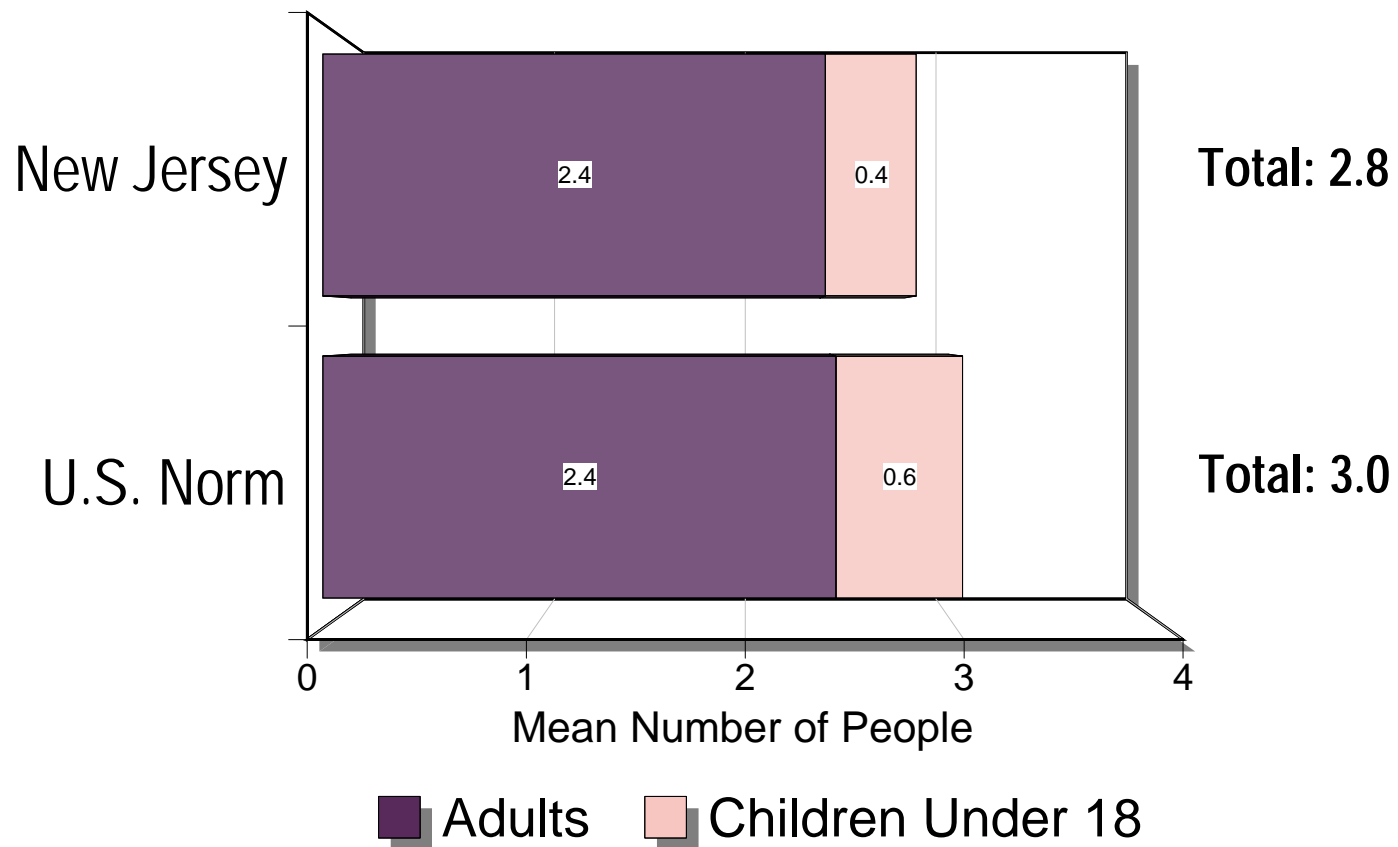


* Percent of trip nights spent in each type of accommodation

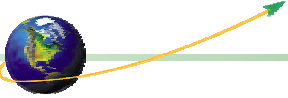
Size of Travel Party



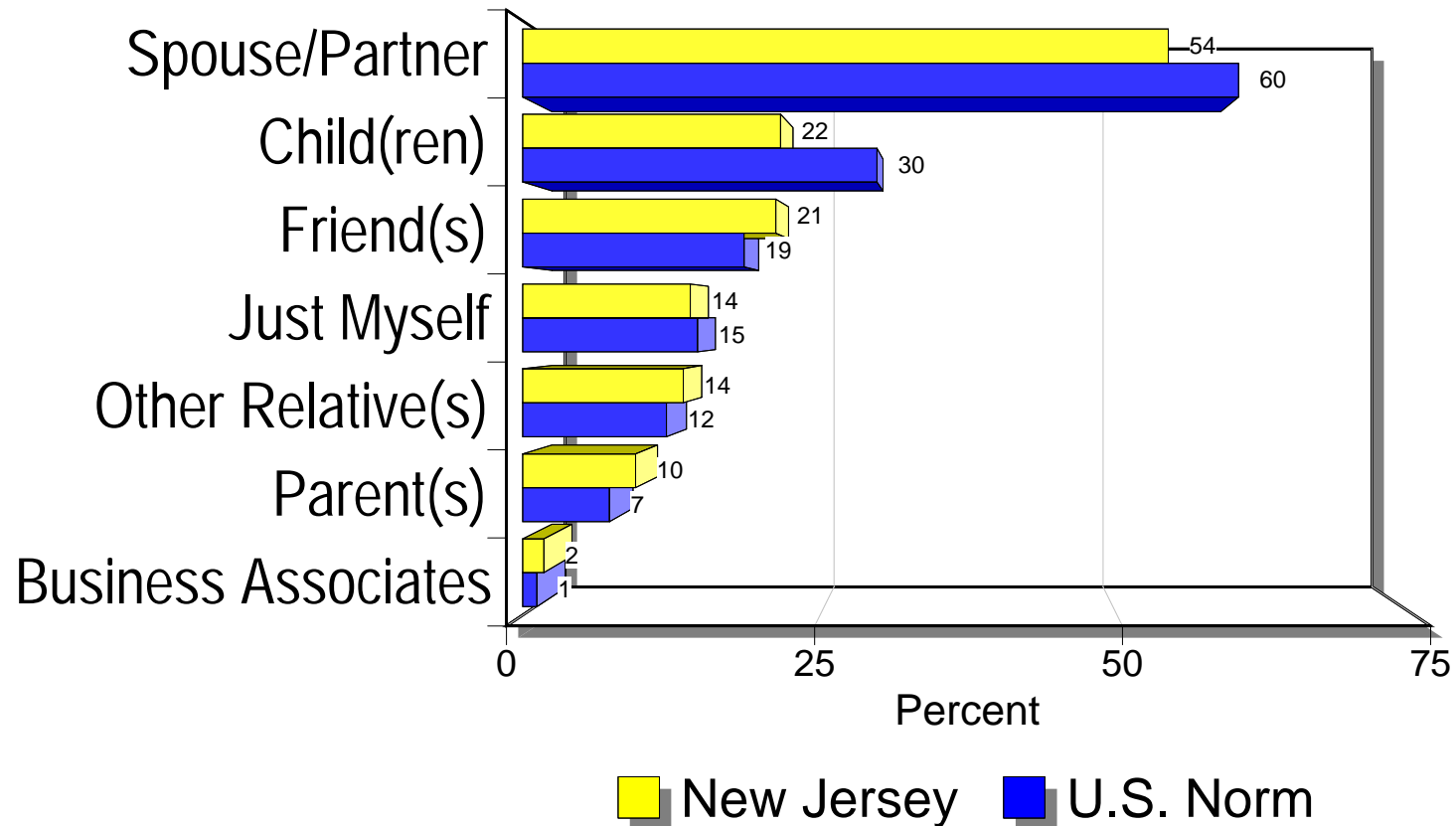
Base: Overnight Pleasure Trips



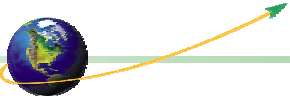
Composition of Travel Party



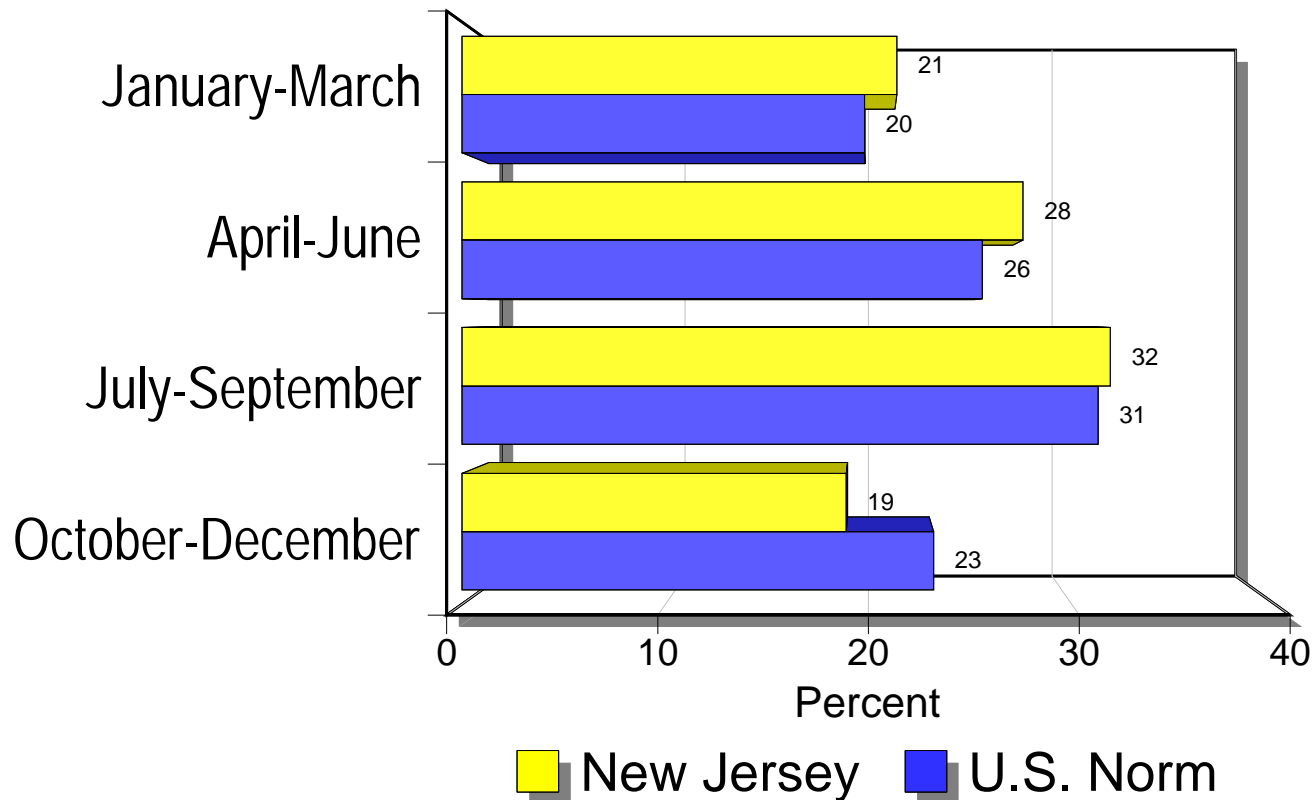
Base: Overnight Pleasure Trips



Distribution of Trips By Quarter



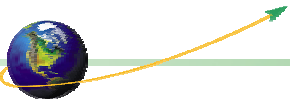
Base: Overnight Pleasure Trips



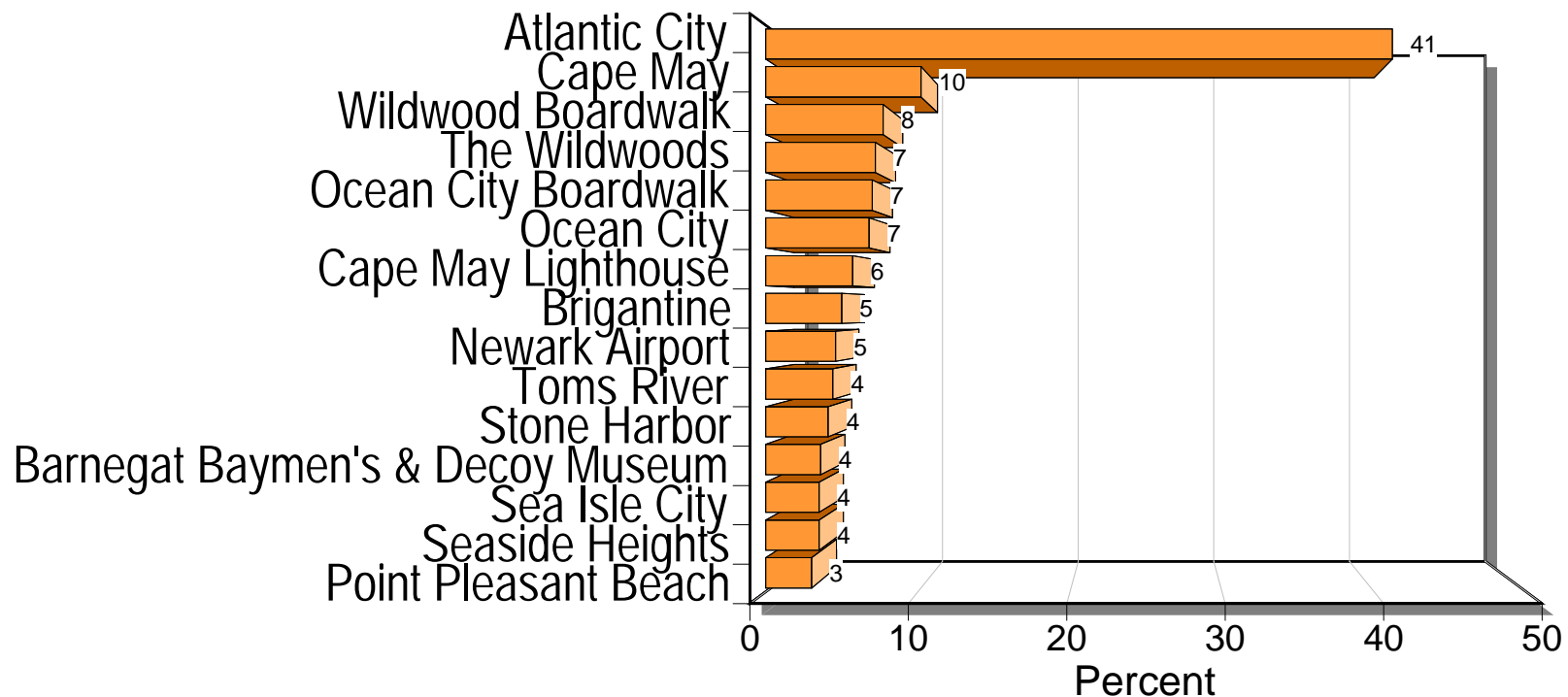


Pleasure Trip Experiences

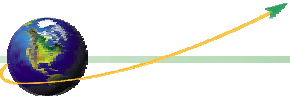
Most Popular New Jersey Attractions



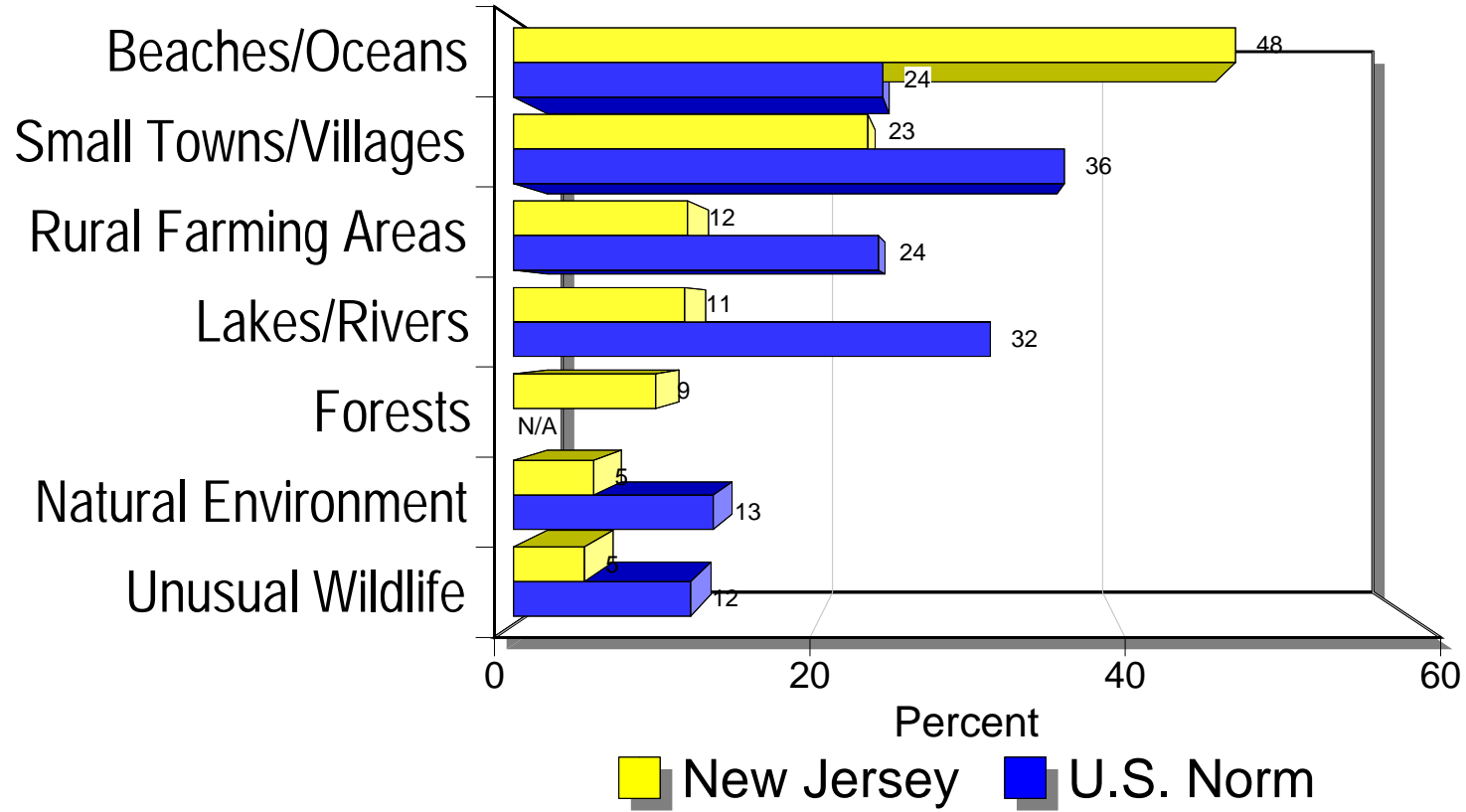
Base: Overnight Pleasure Trips



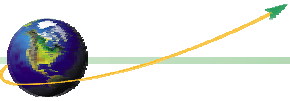
Things Experienced on the Trip



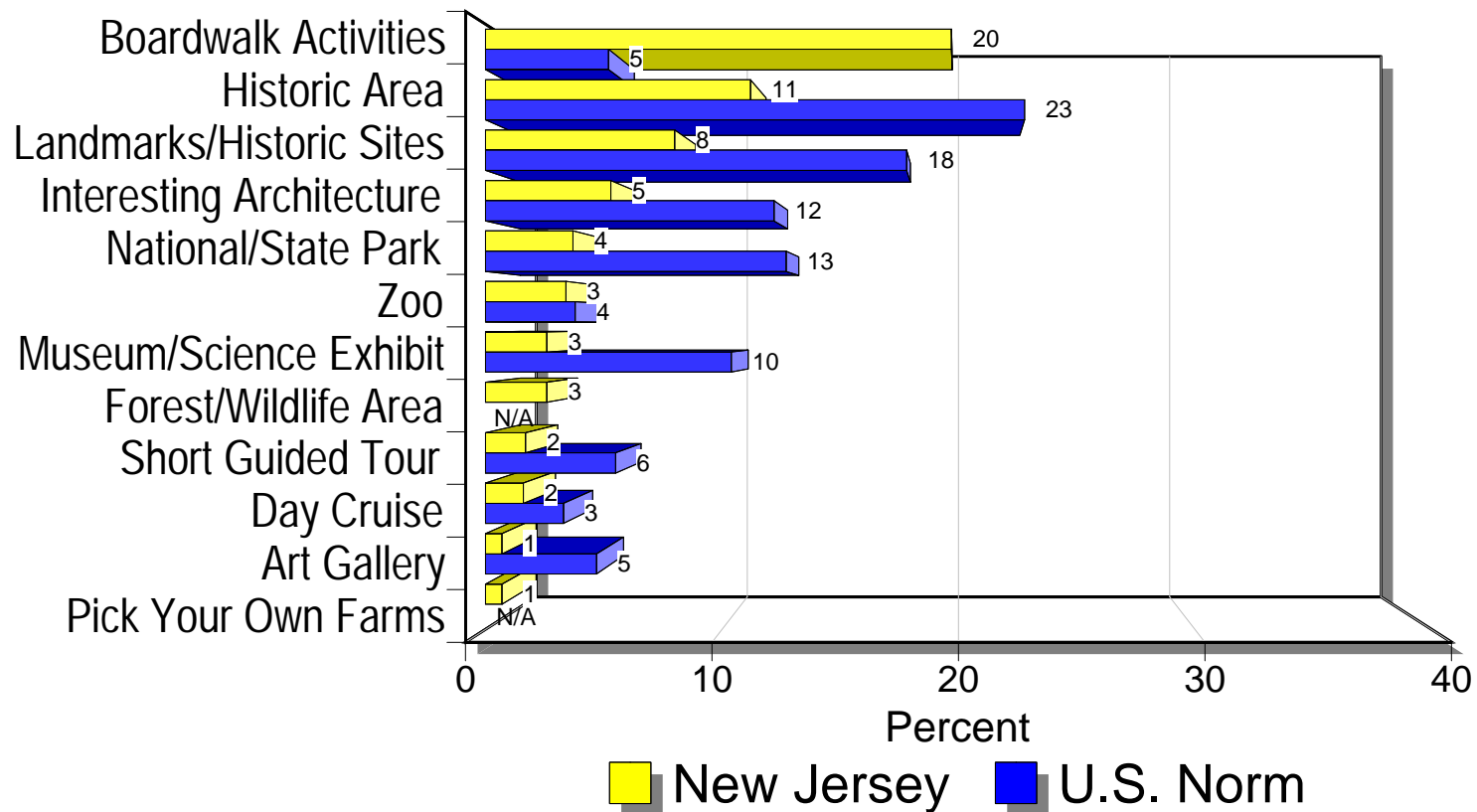
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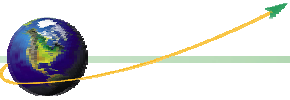
Sightseeing



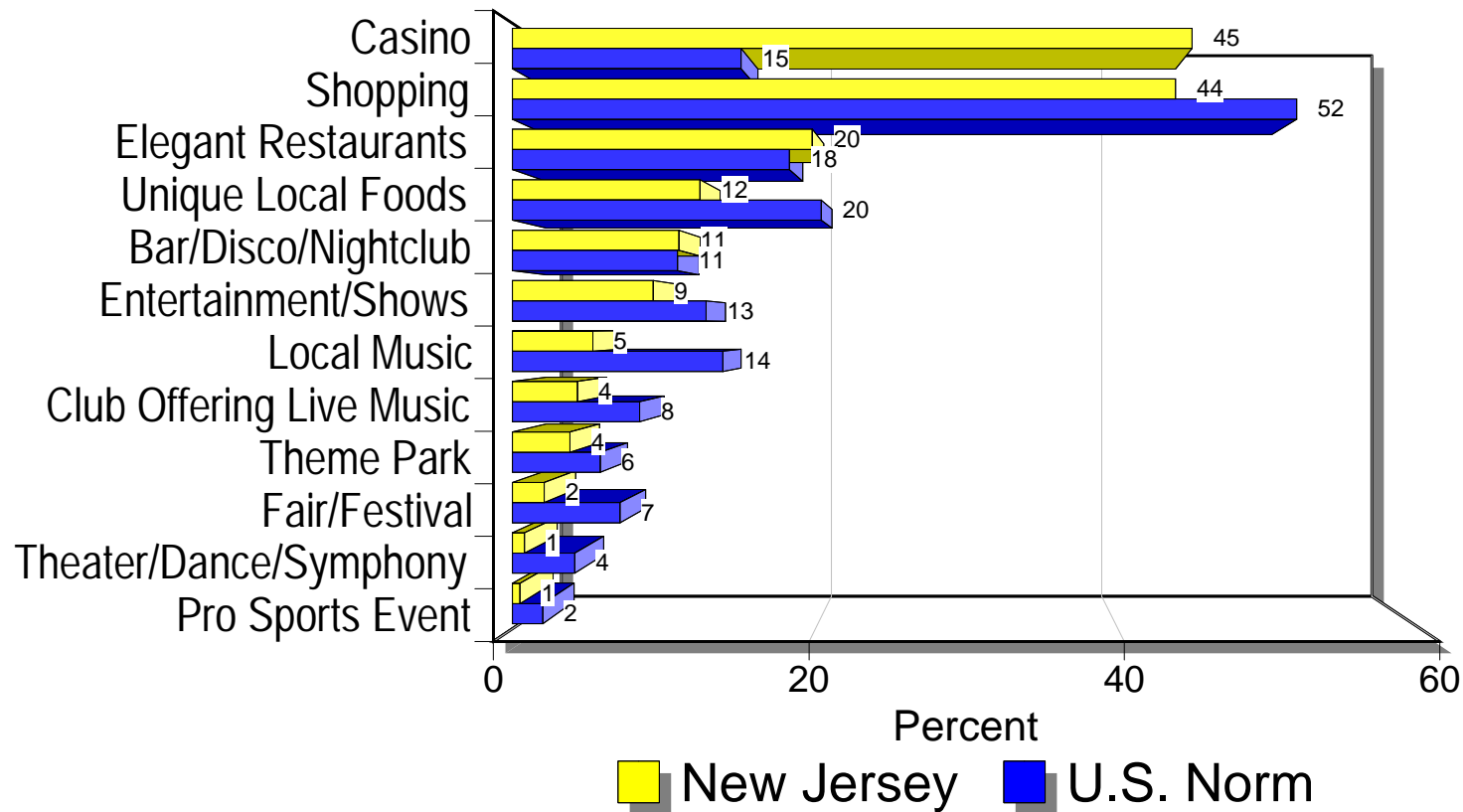
Base: Overnight Pleasure Trips



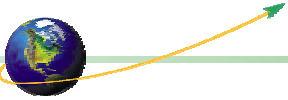
Entertainment



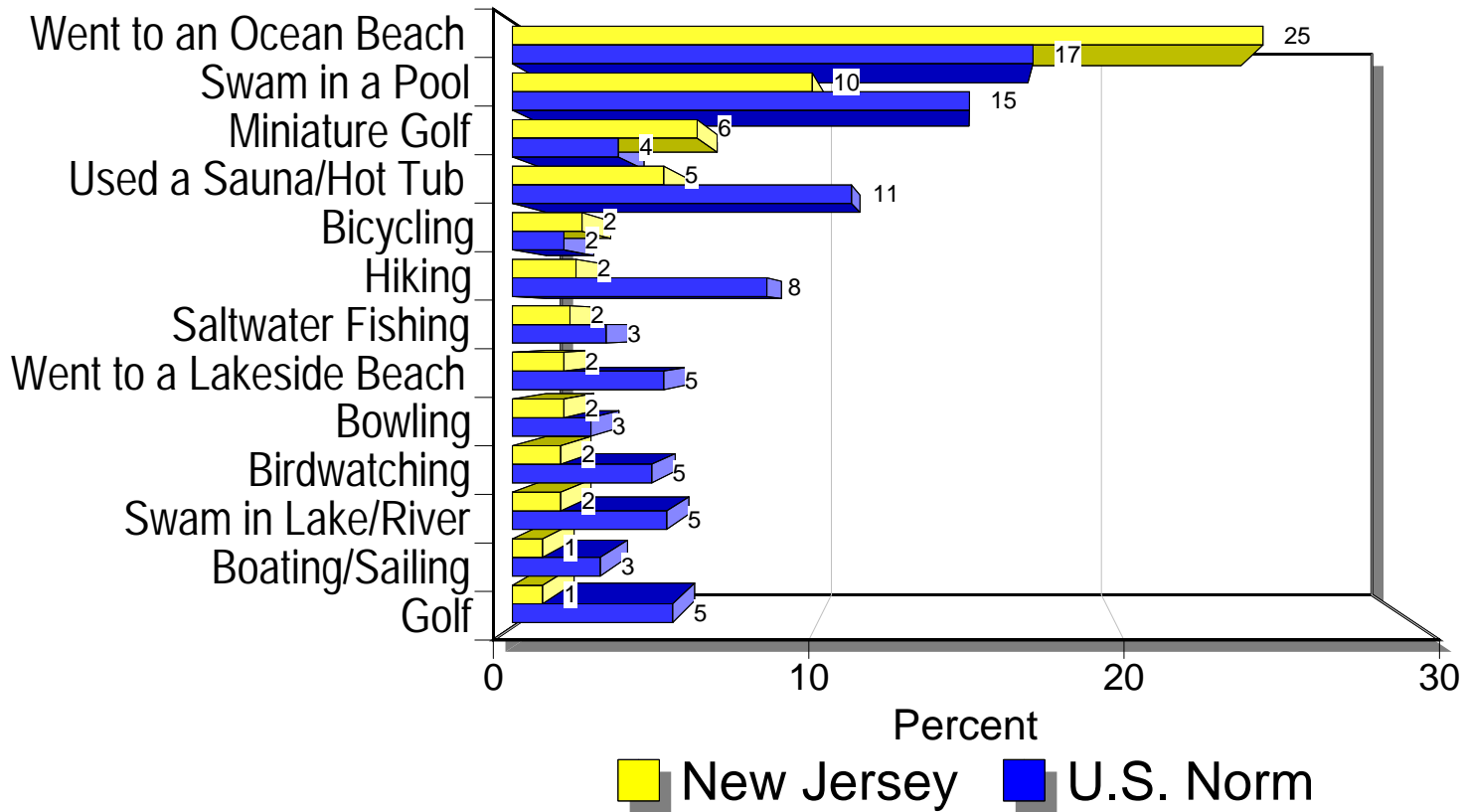
Base: Overnight Pleasure Trips



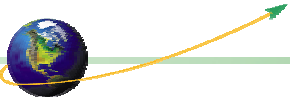
Sports & Recreation



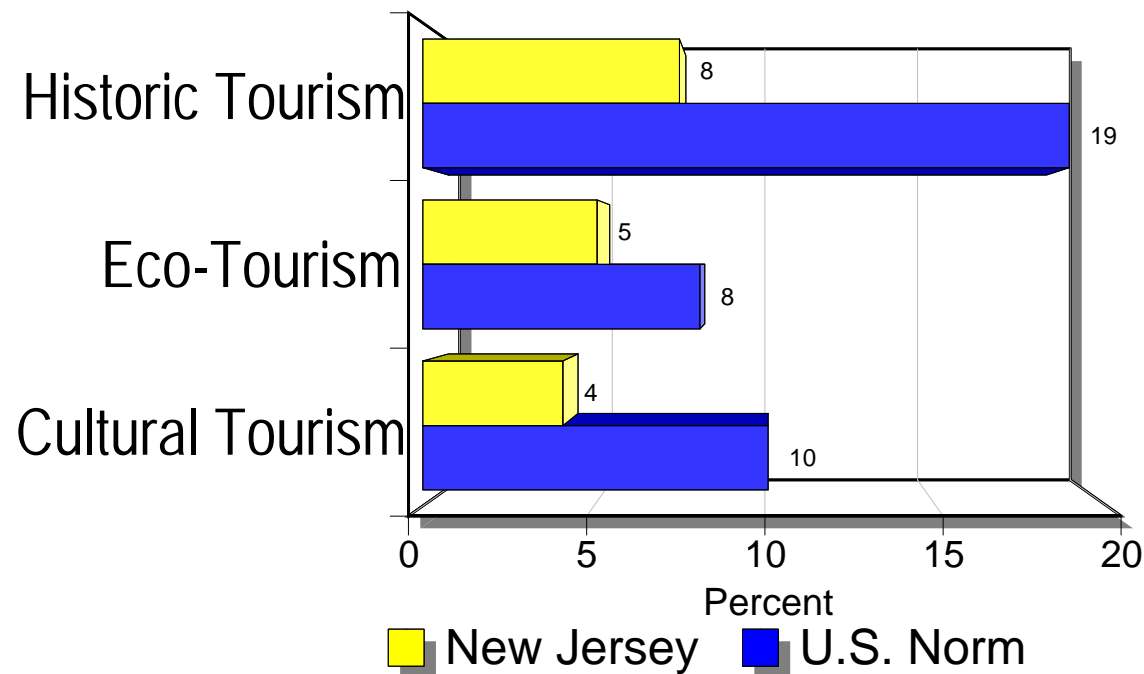
Base: Overnight Pleasure Trips



Historic, Cultural, and Eco-Tourism*

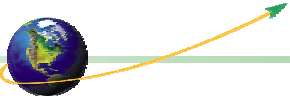


Base: Overnight Pleasure Trips

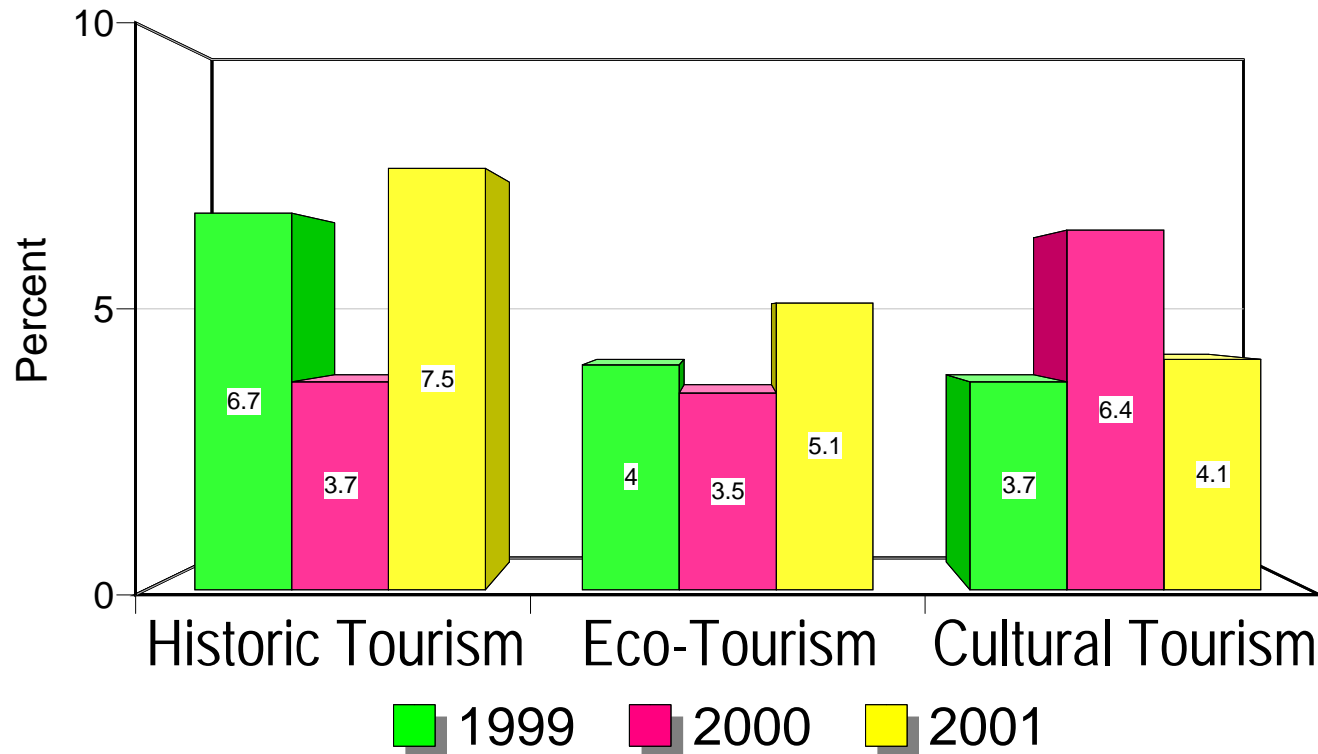


* Percent who said cultural, historic or eco-tourism was of particular interest on trip

Cultural, Historic, and Eco-Tourism* to New Jersey



Base: Overnight Pleasure Trips

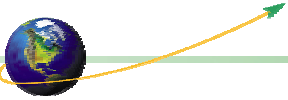


*Percent who said cultural, historic or eco tourism was of particular interest

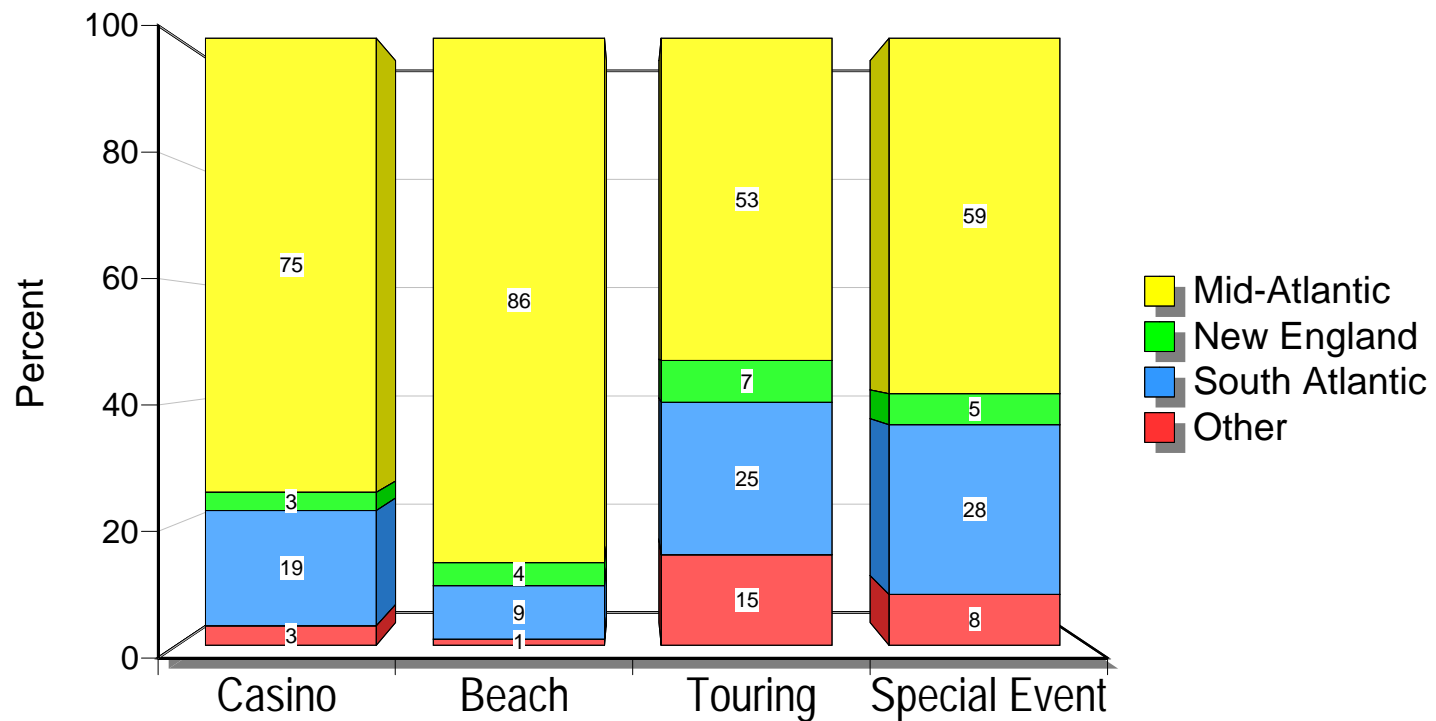


New Jersey Travel Profile:
*Casino, Beach, Touring and
Special Event Trips*

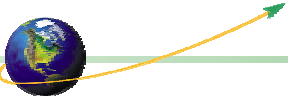
Sources of Business



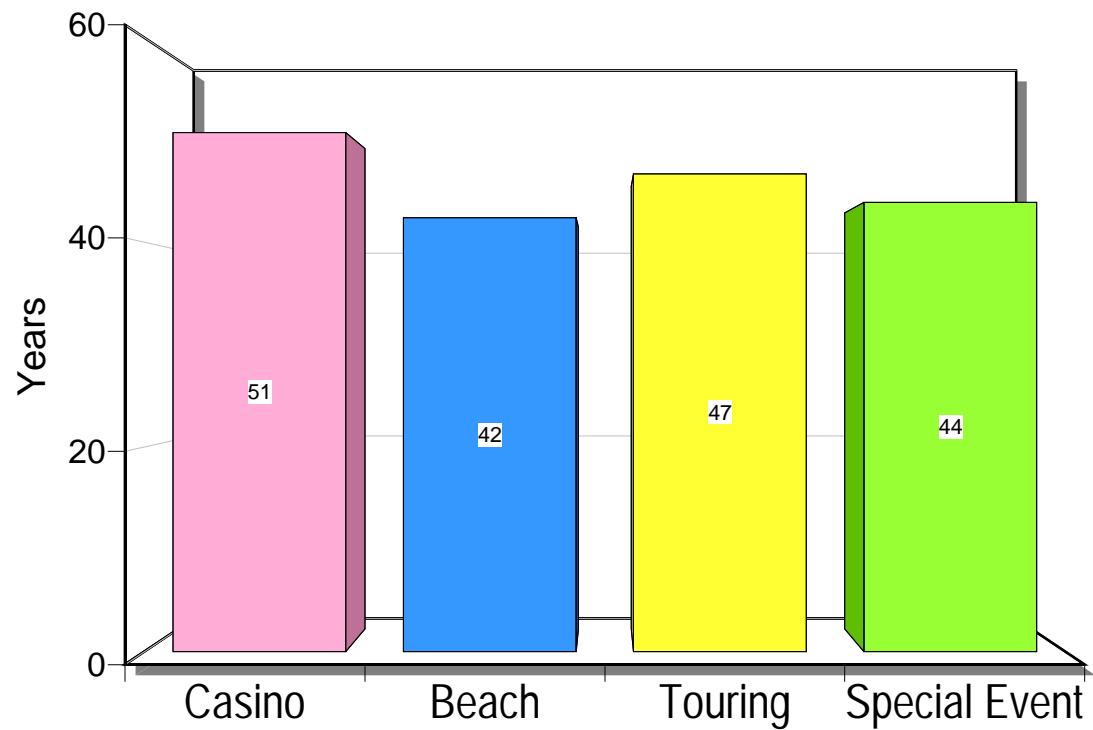
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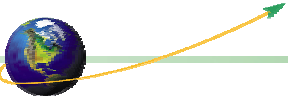
Average Age



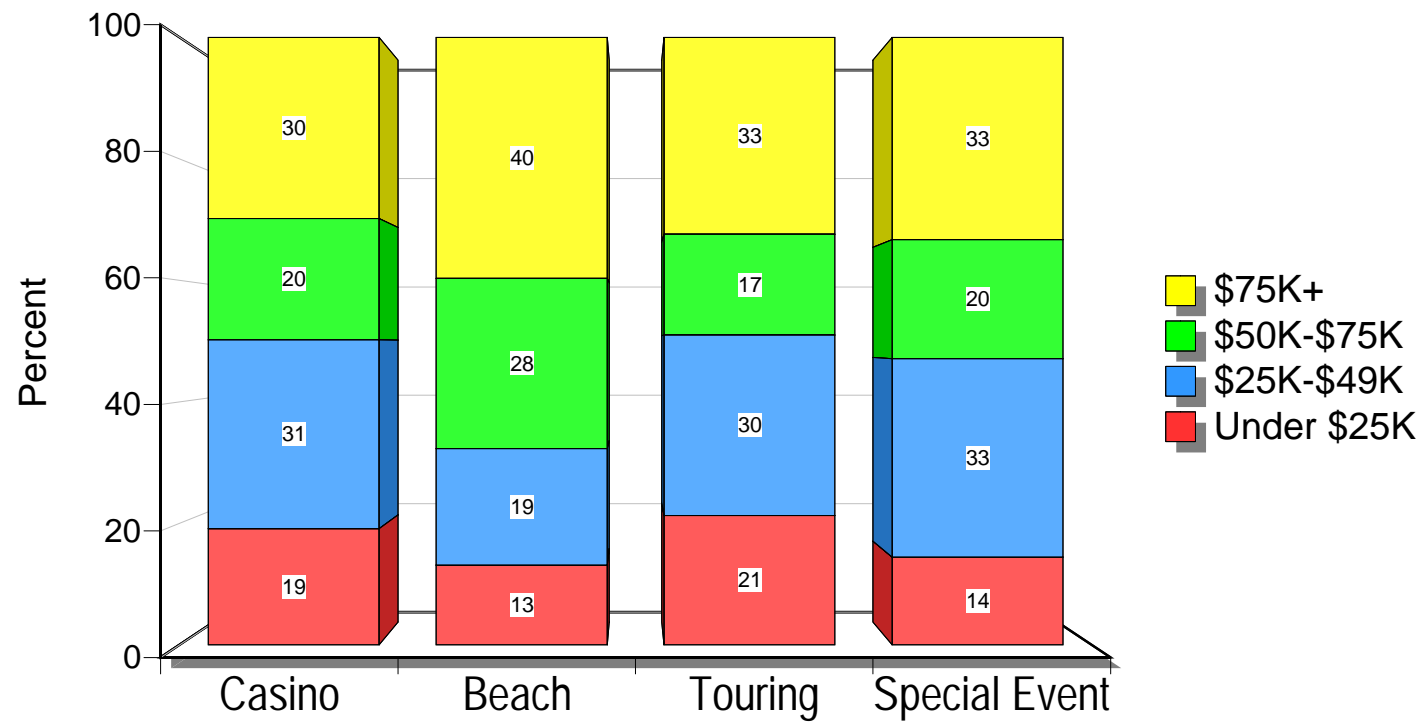
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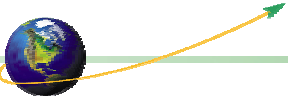
Income



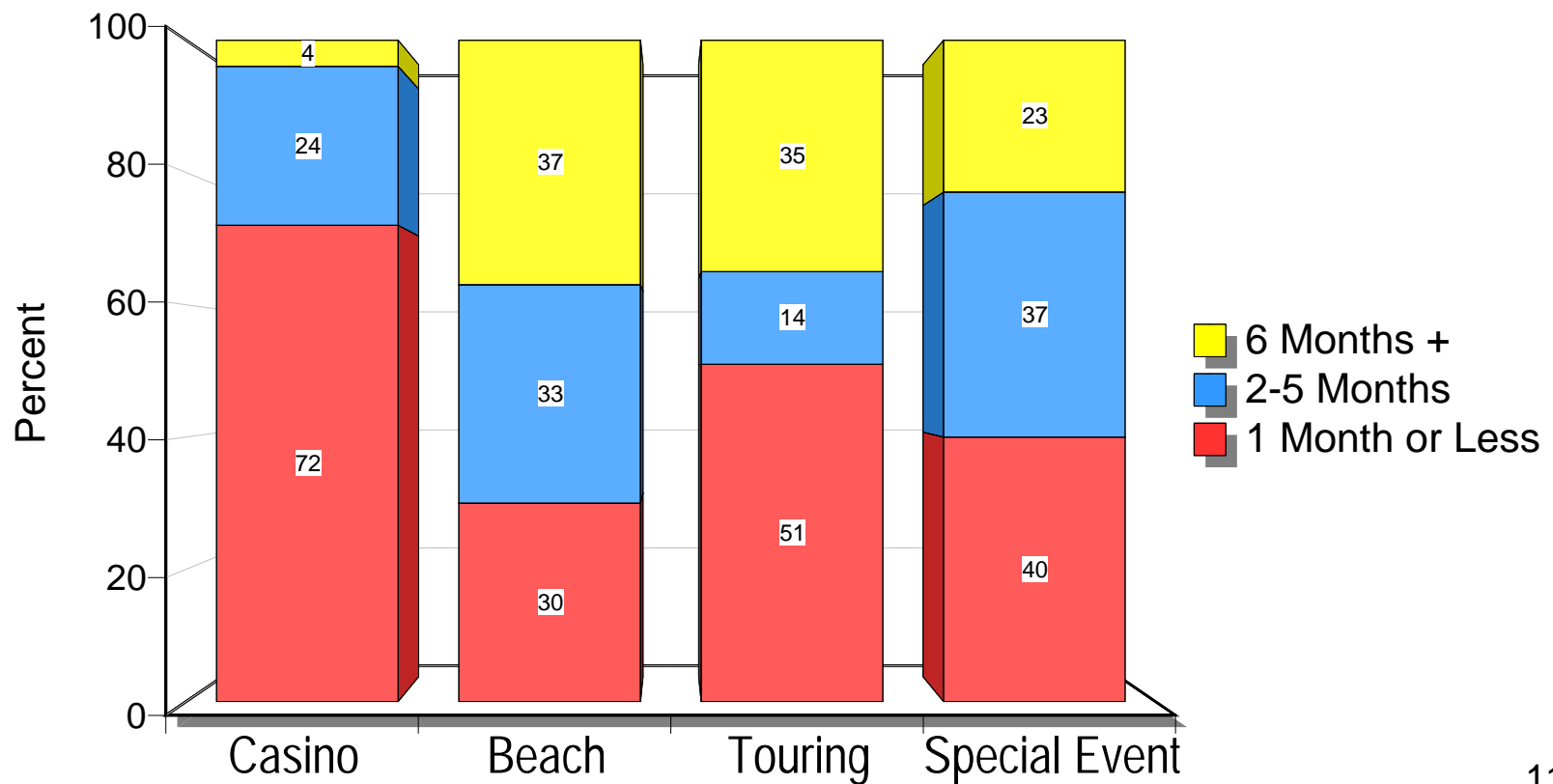
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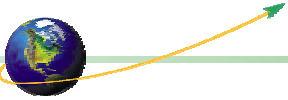
Planning Cycle



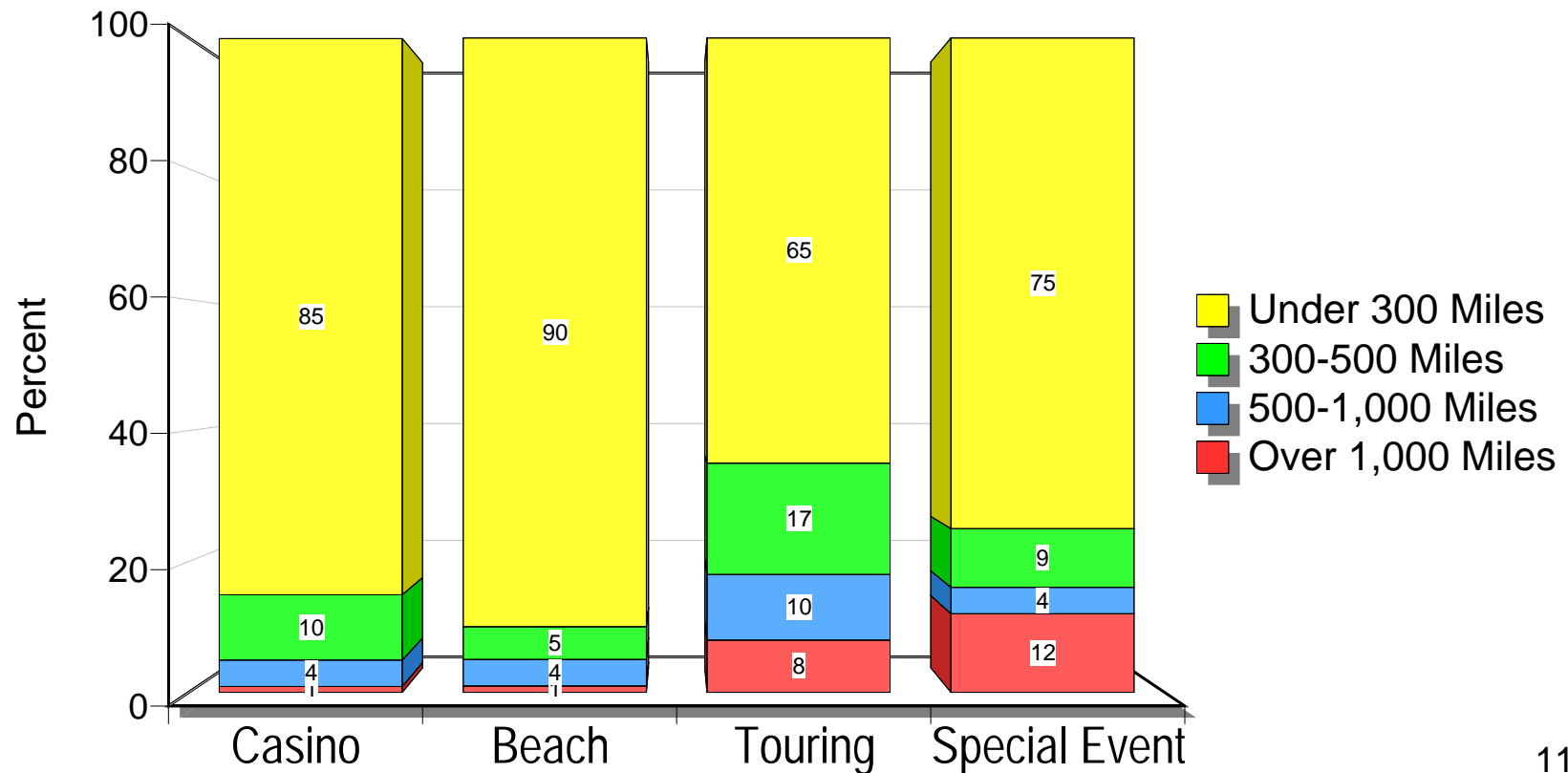
Base: Overnight Trips



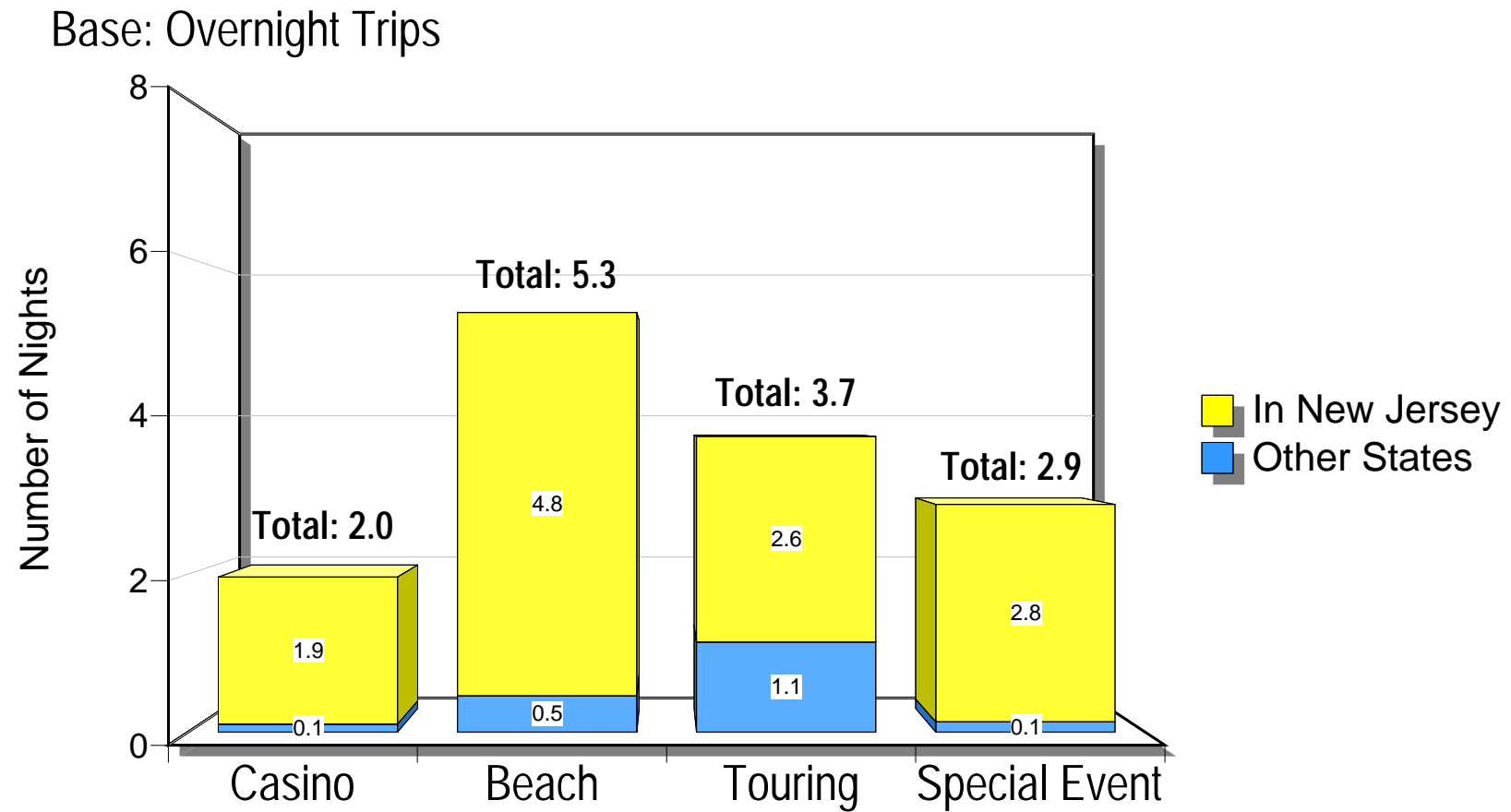
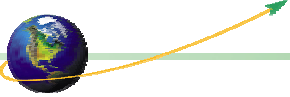
Distance Traveled to New Jersey



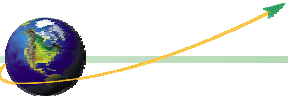
Base: Overnight Trips



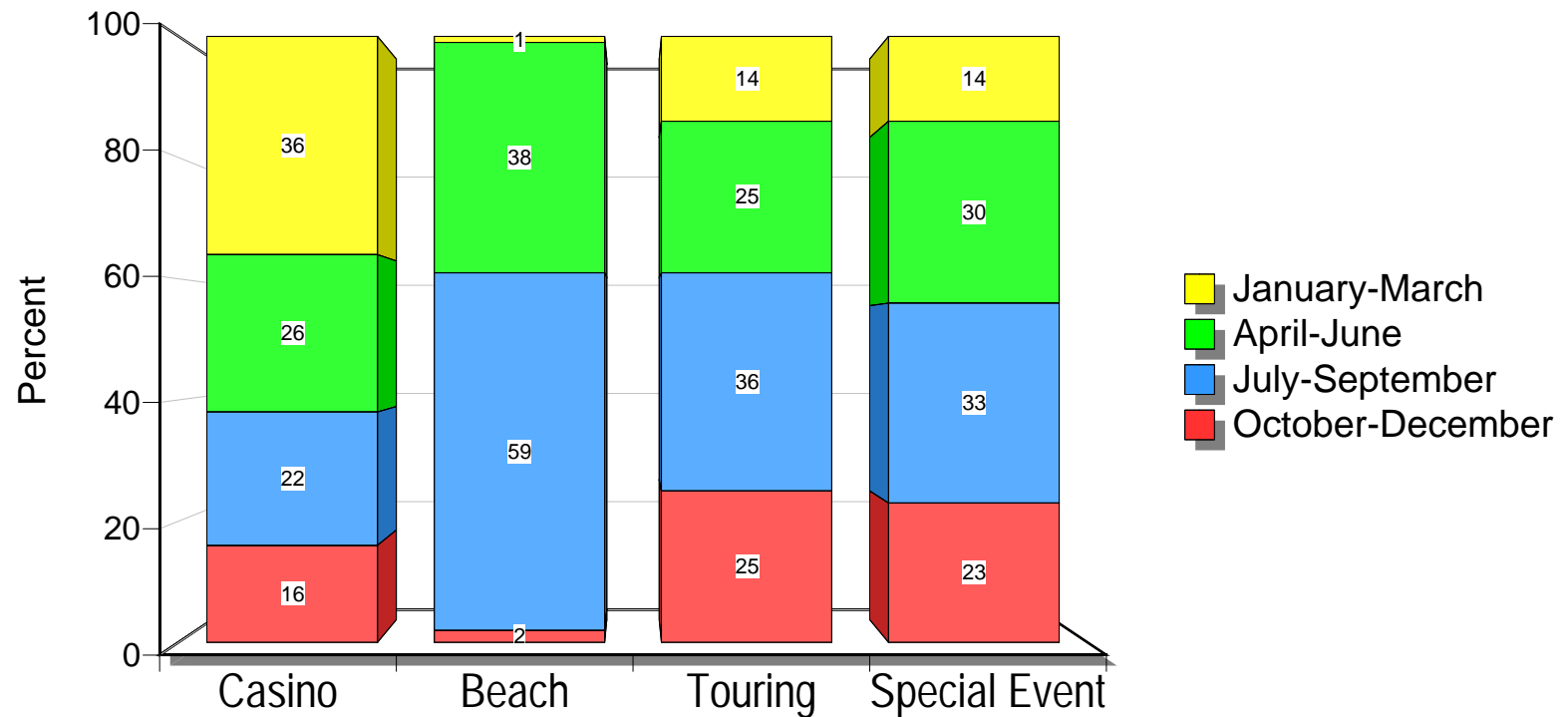
Average Nights Away – In New Jersey vs. Other States



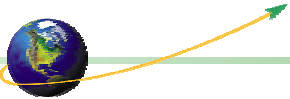
Seasonality



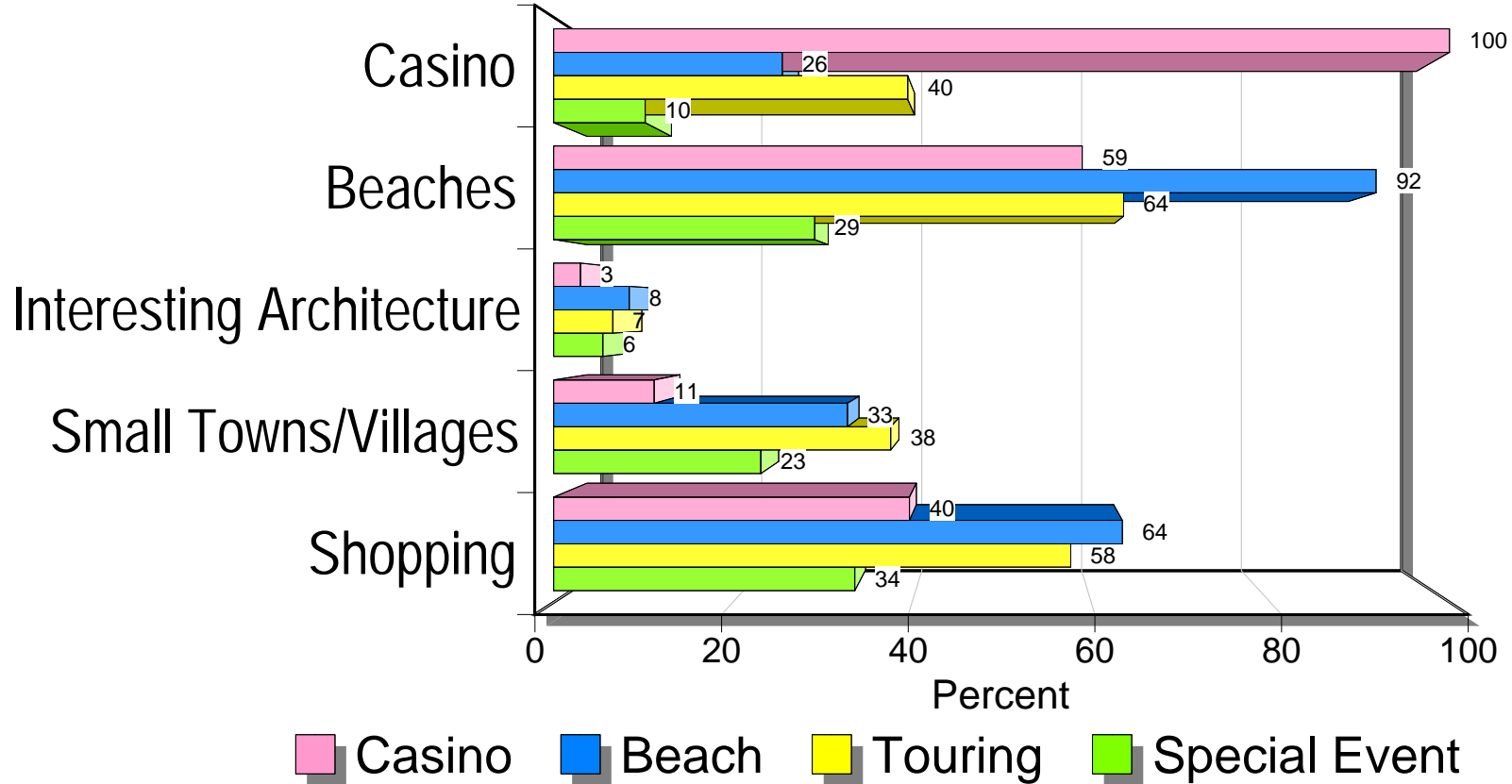
Base: Overnight Trips



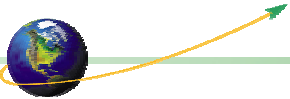
Things Experienced in New Jersey



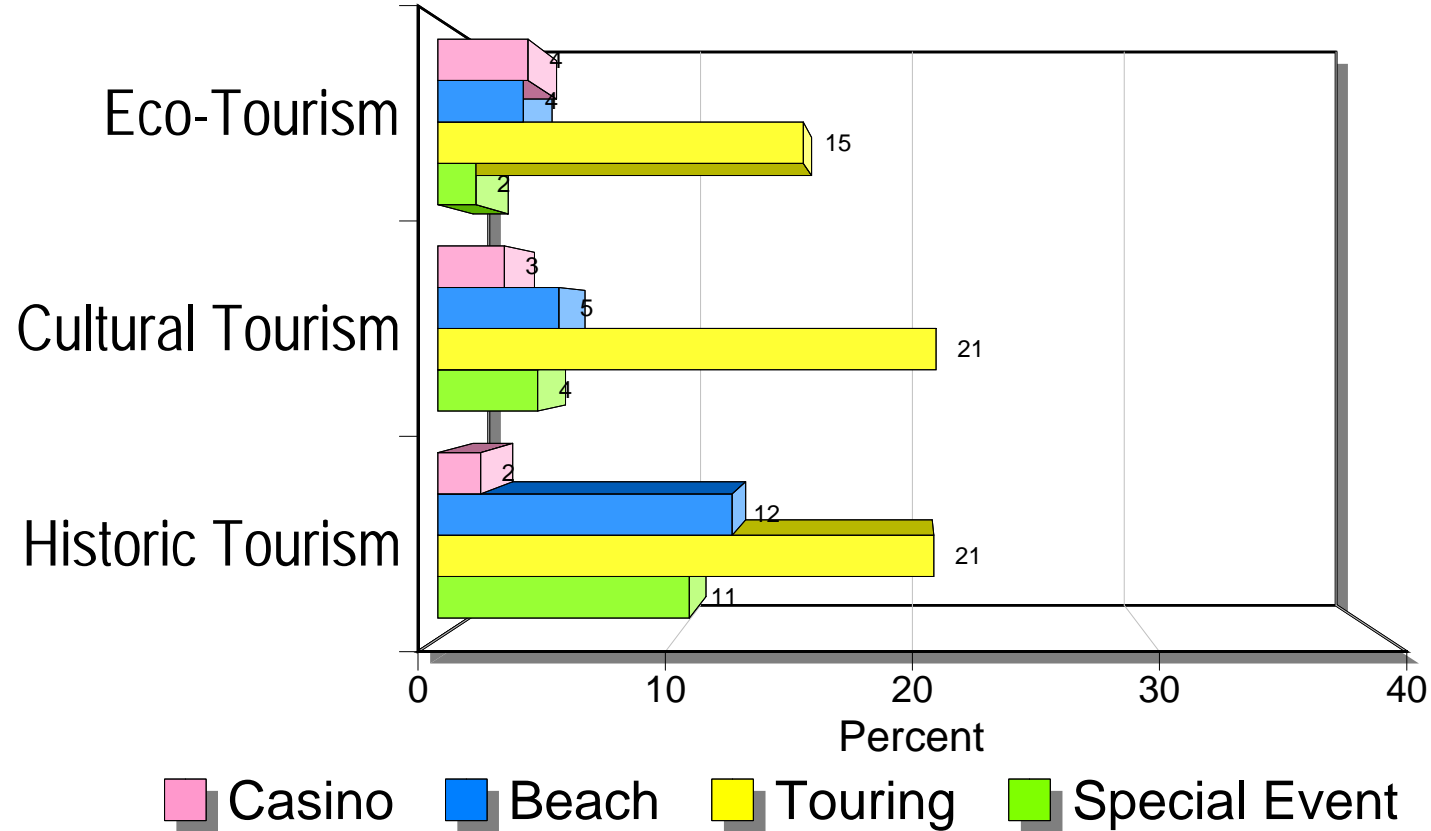
Base: Overnight Trips



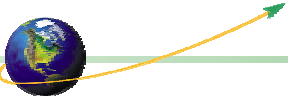
Cultural, Historic, and Eco-Tourism



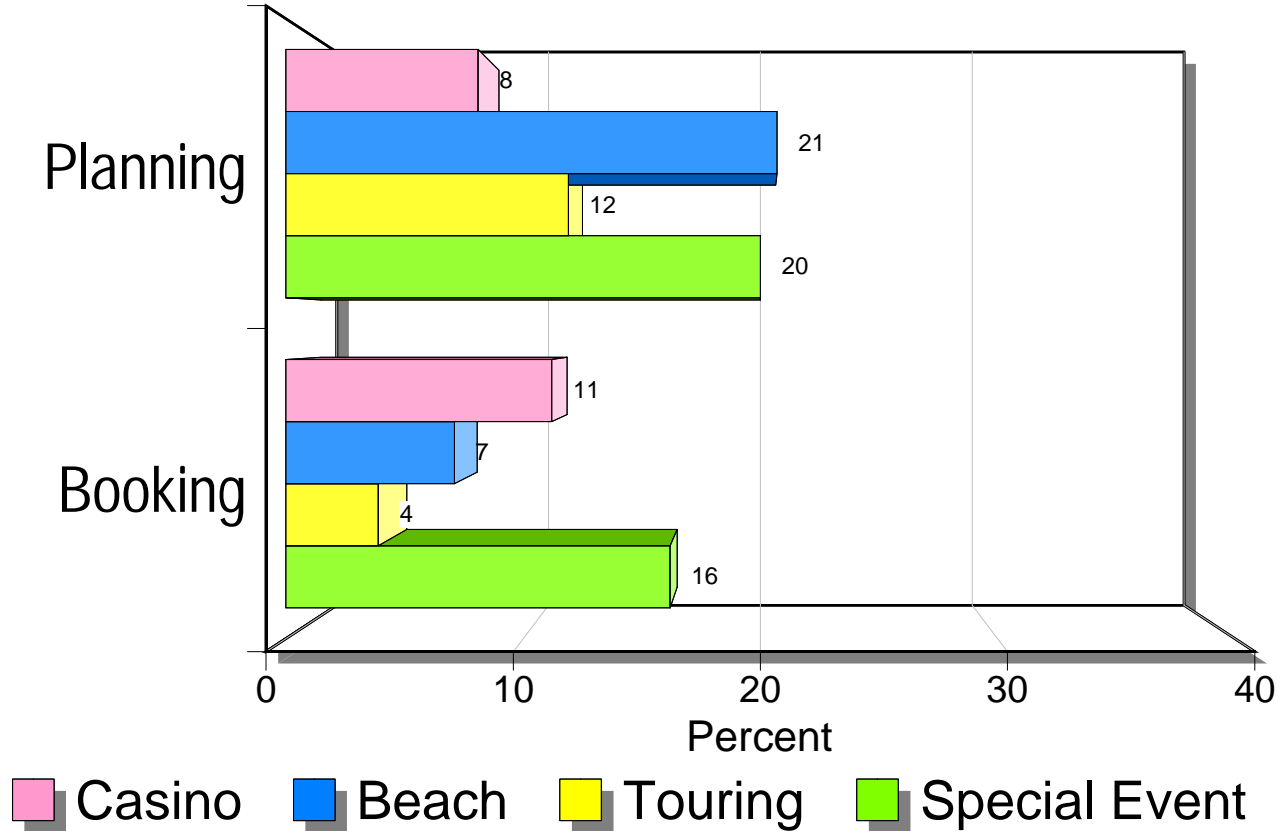
Base: Overnight Trips



Use of the Internet

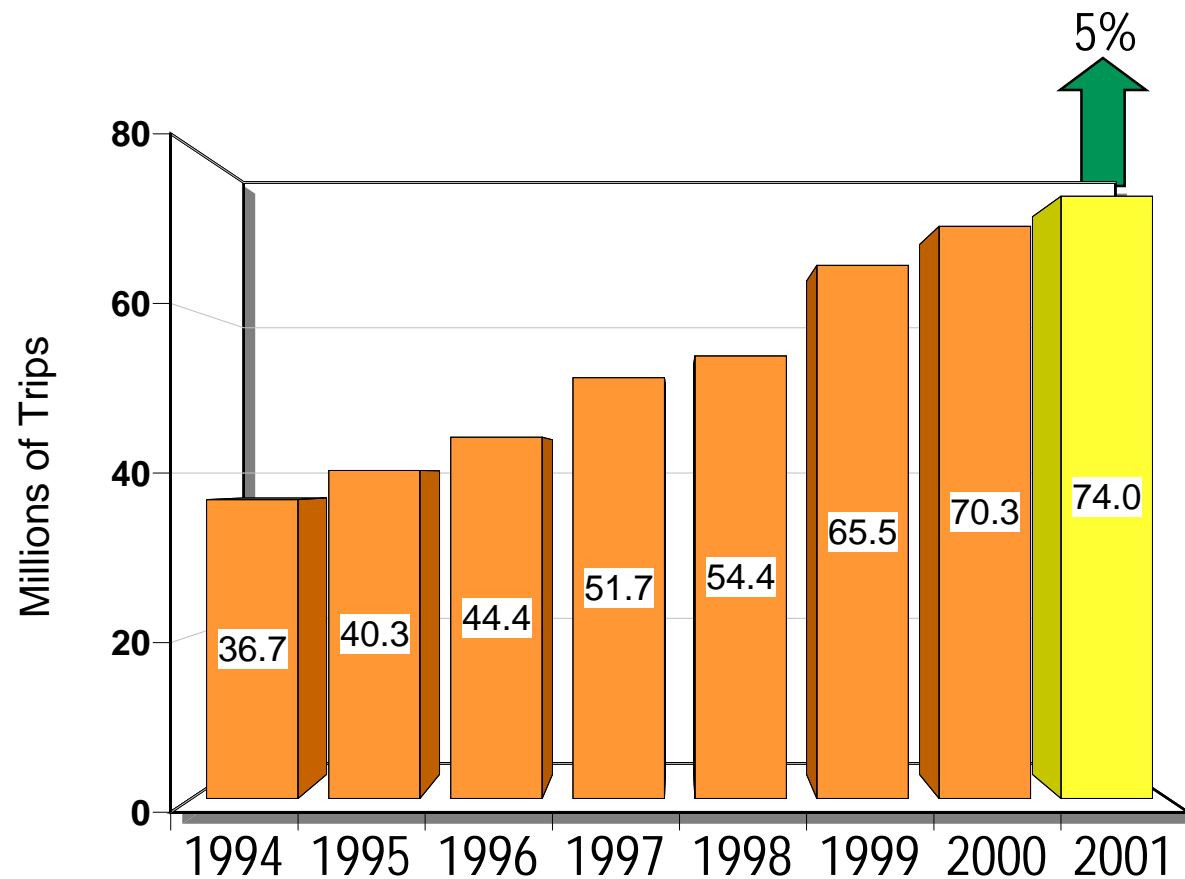
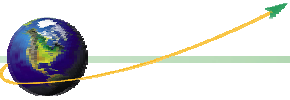


Base: Overnight Trips

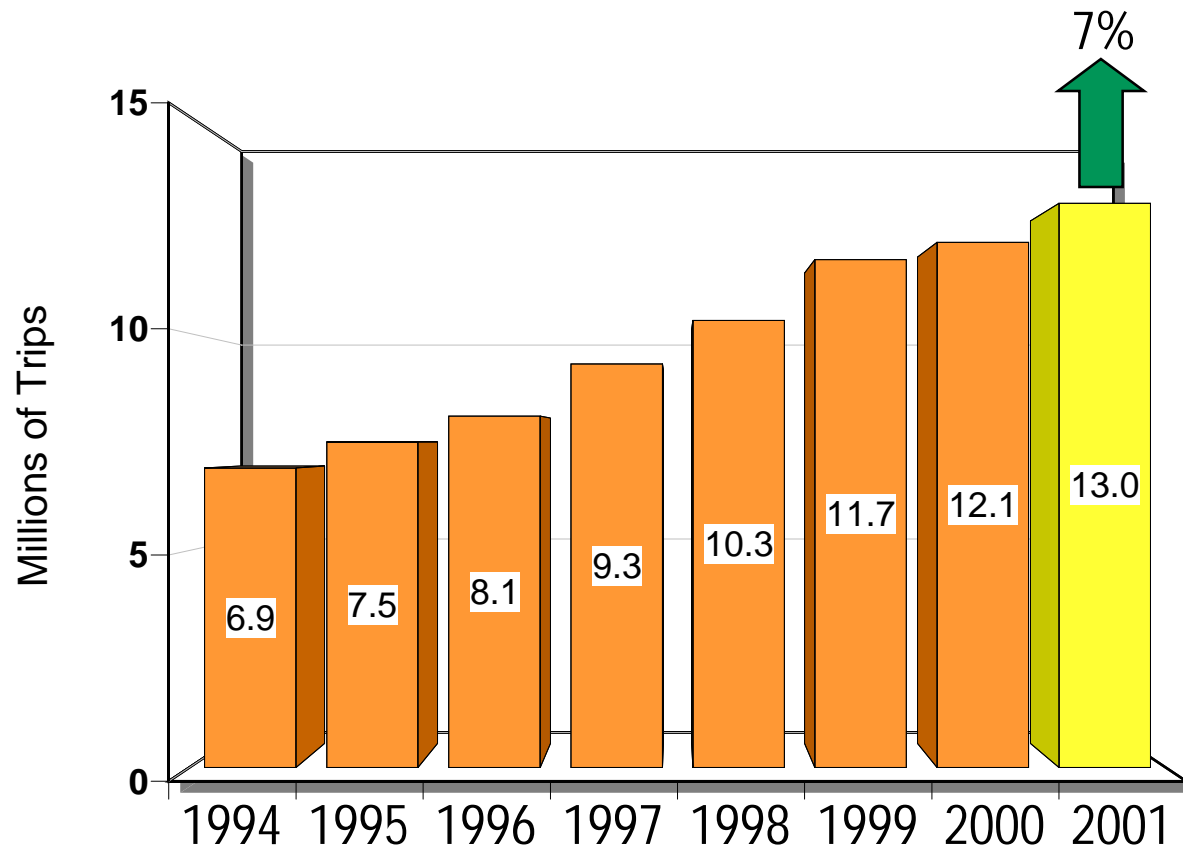
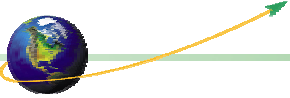


Gaming

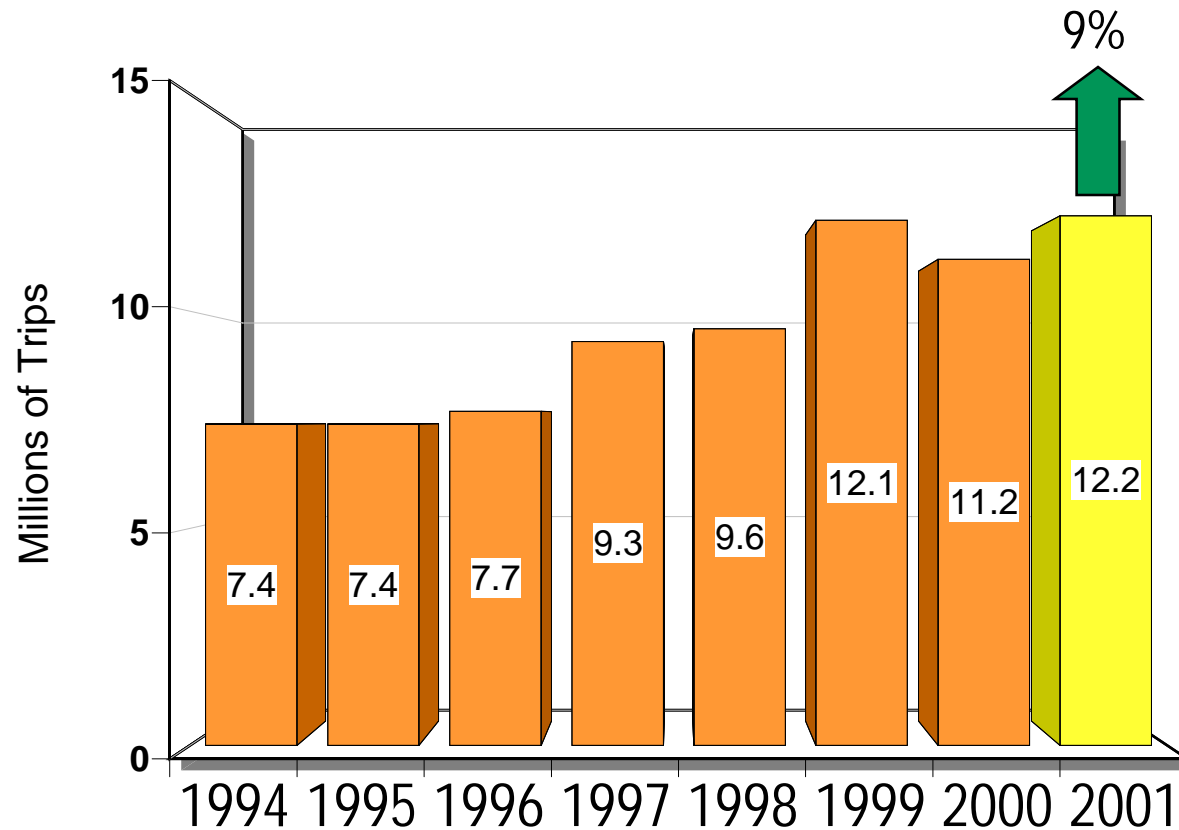
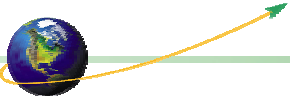
Total U.S. Overnight Casino Trips



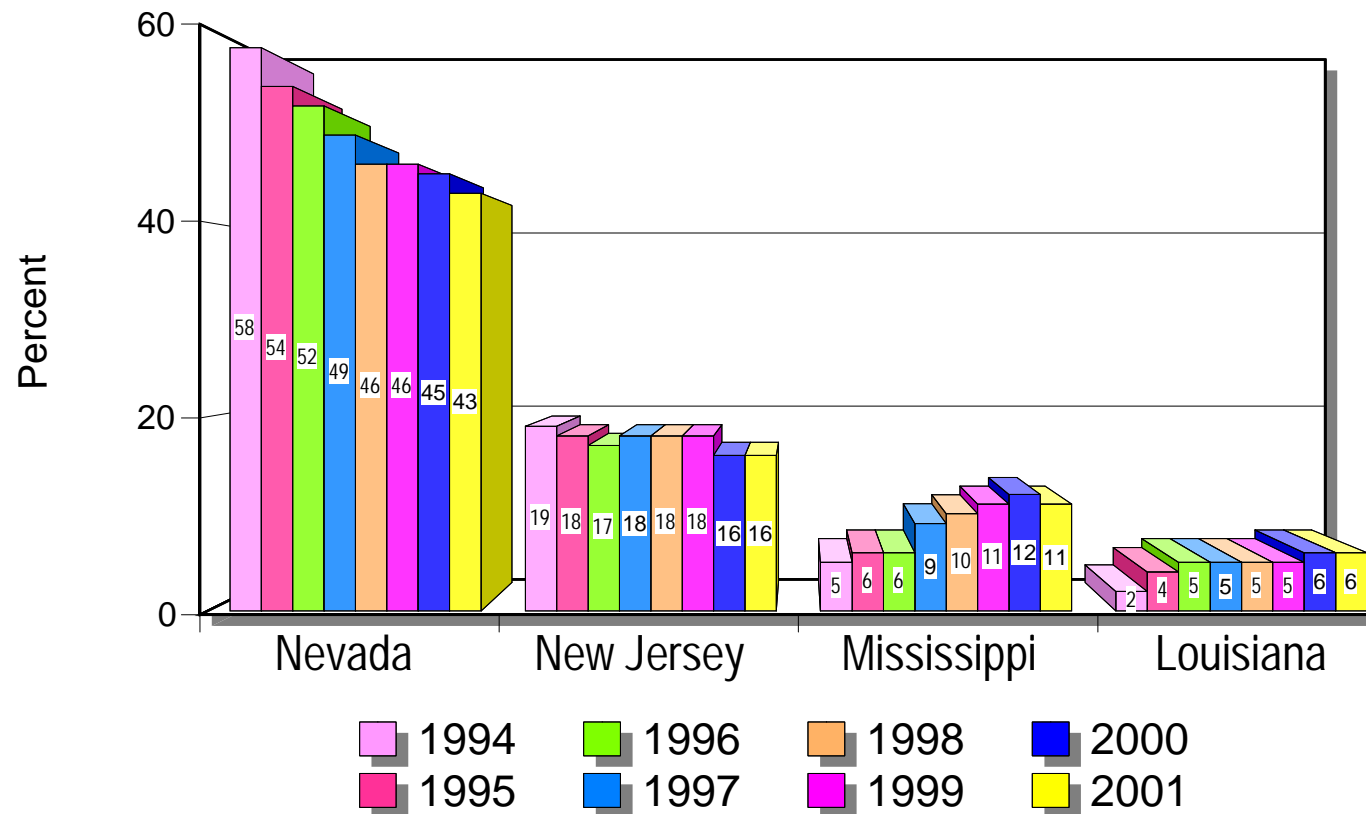
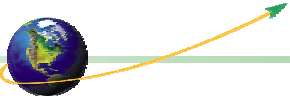
Total Overnight Casino Trips by Mid-Atlantic Residents



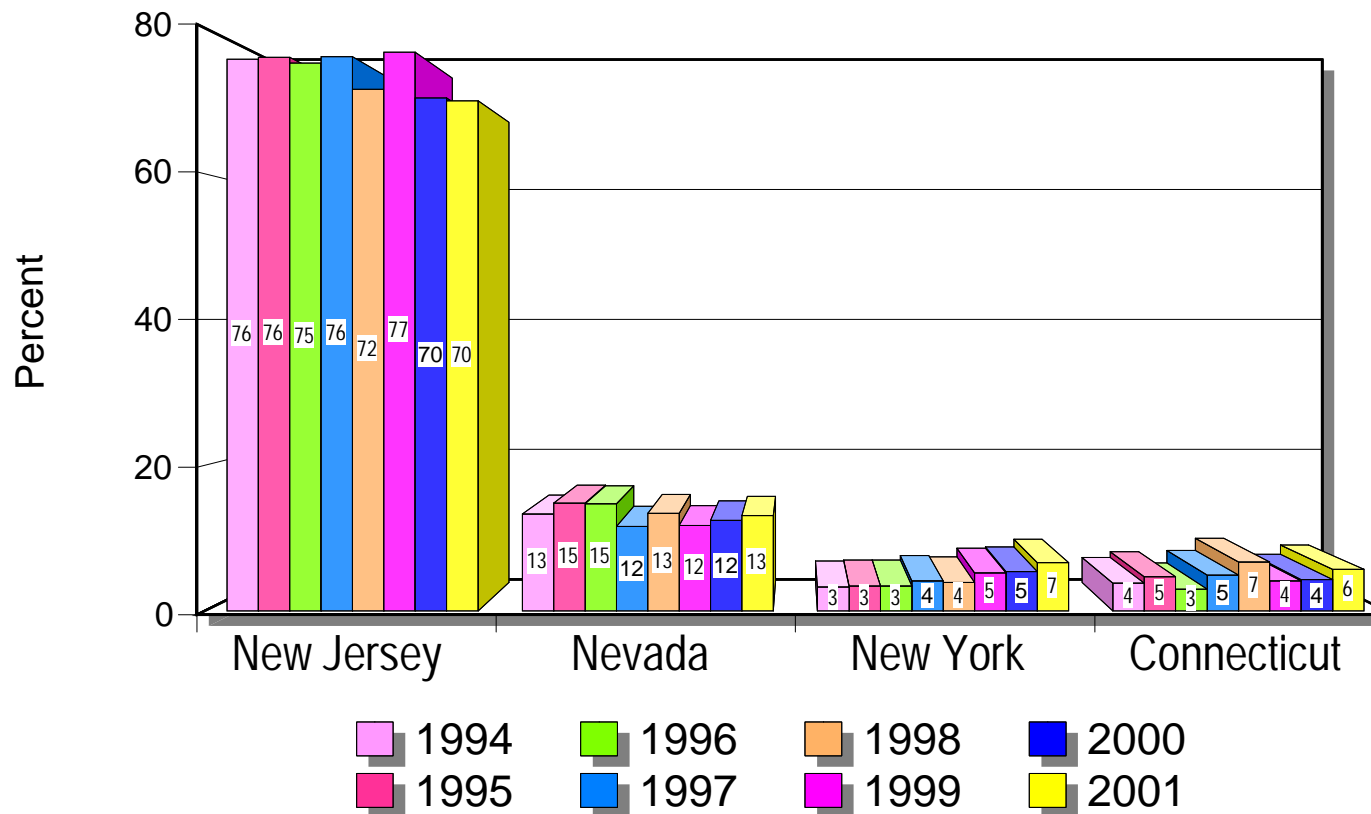
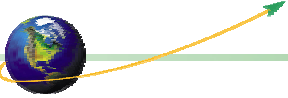
Overnight Casino Trips to New Jersey



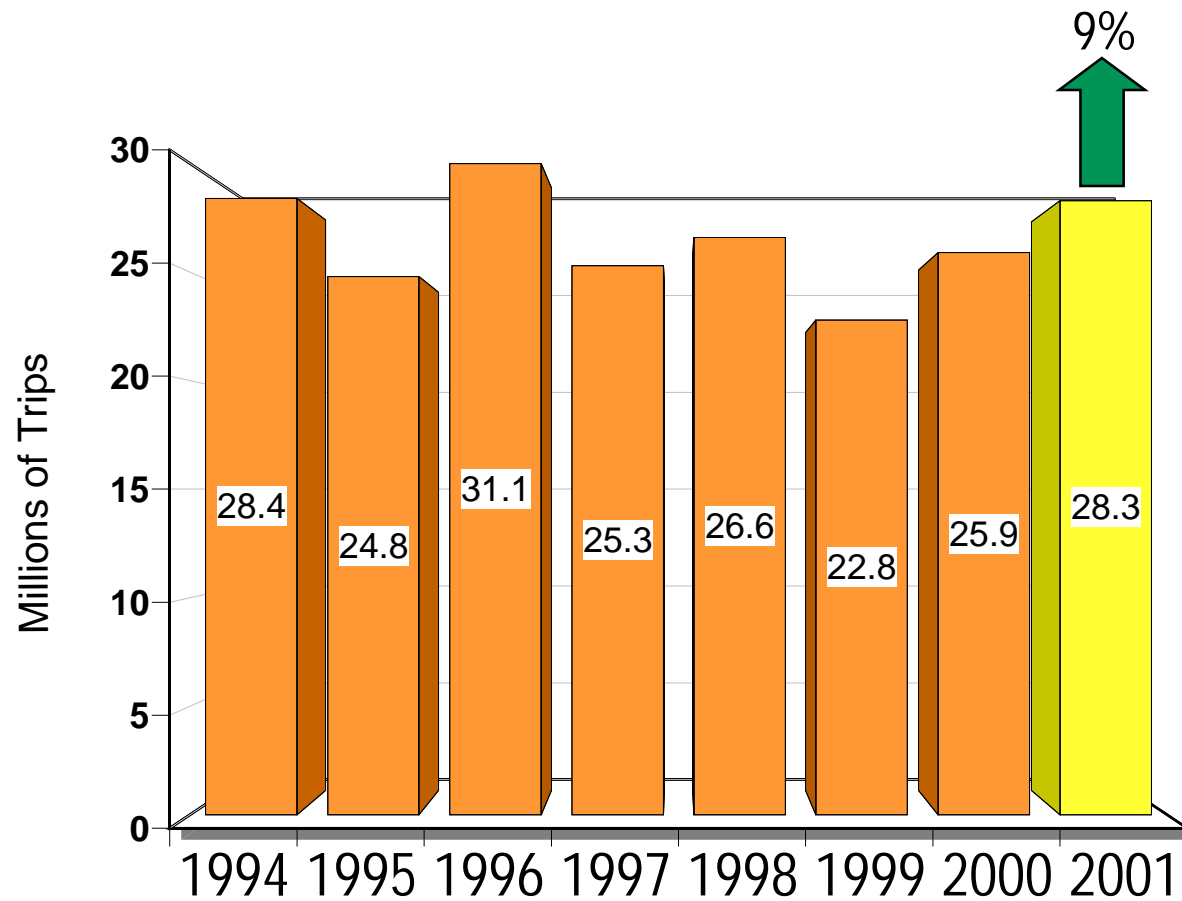
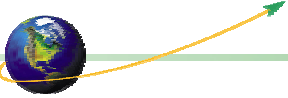
Destination of U.S. Overnight Casino Trips



Destination of Mid-Atlantic Overnight Casino Trips



Day Casino Trips to New Jersey

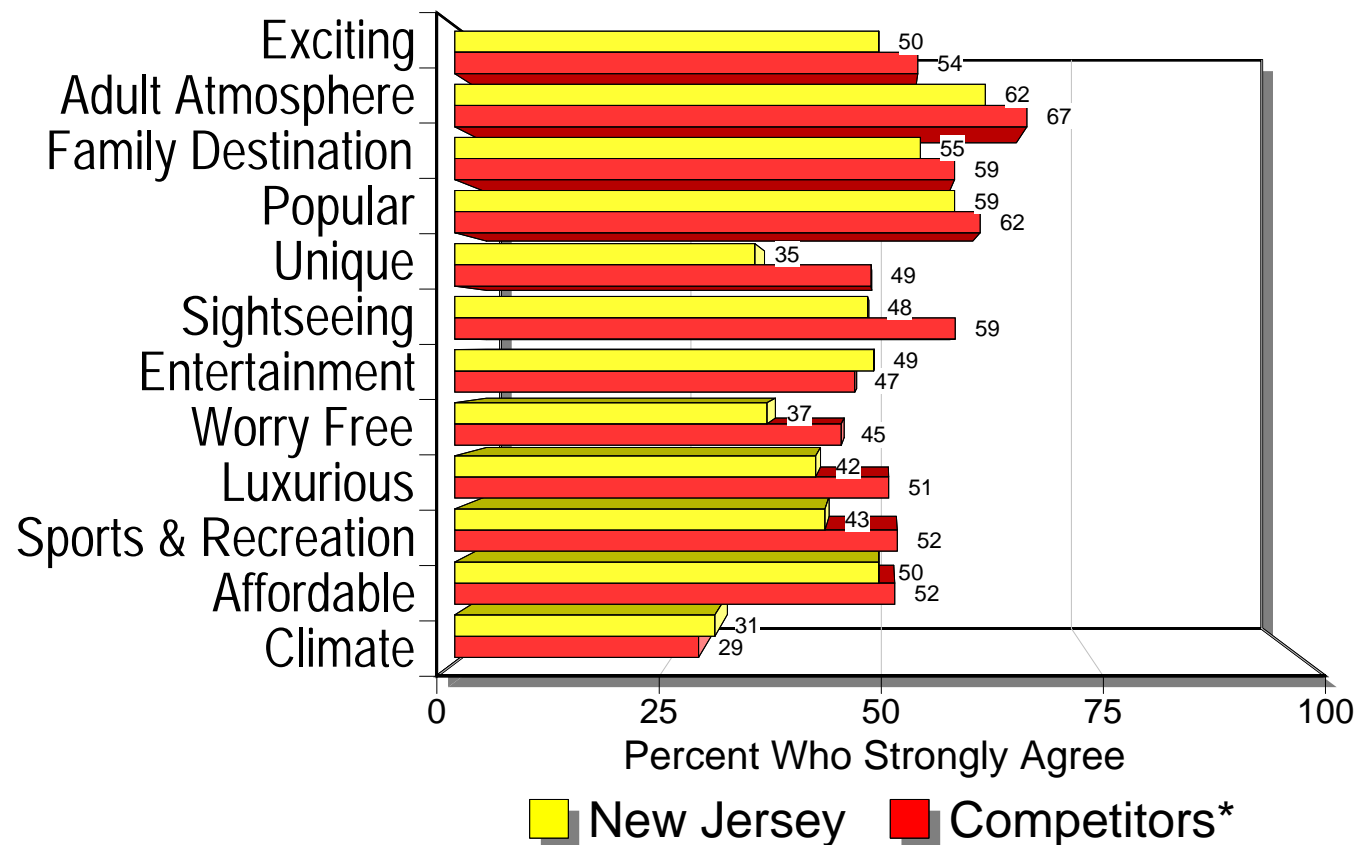
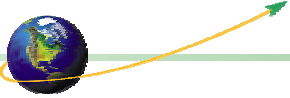




New Jersey's Image

New Jersey's Image vs. Competitors*

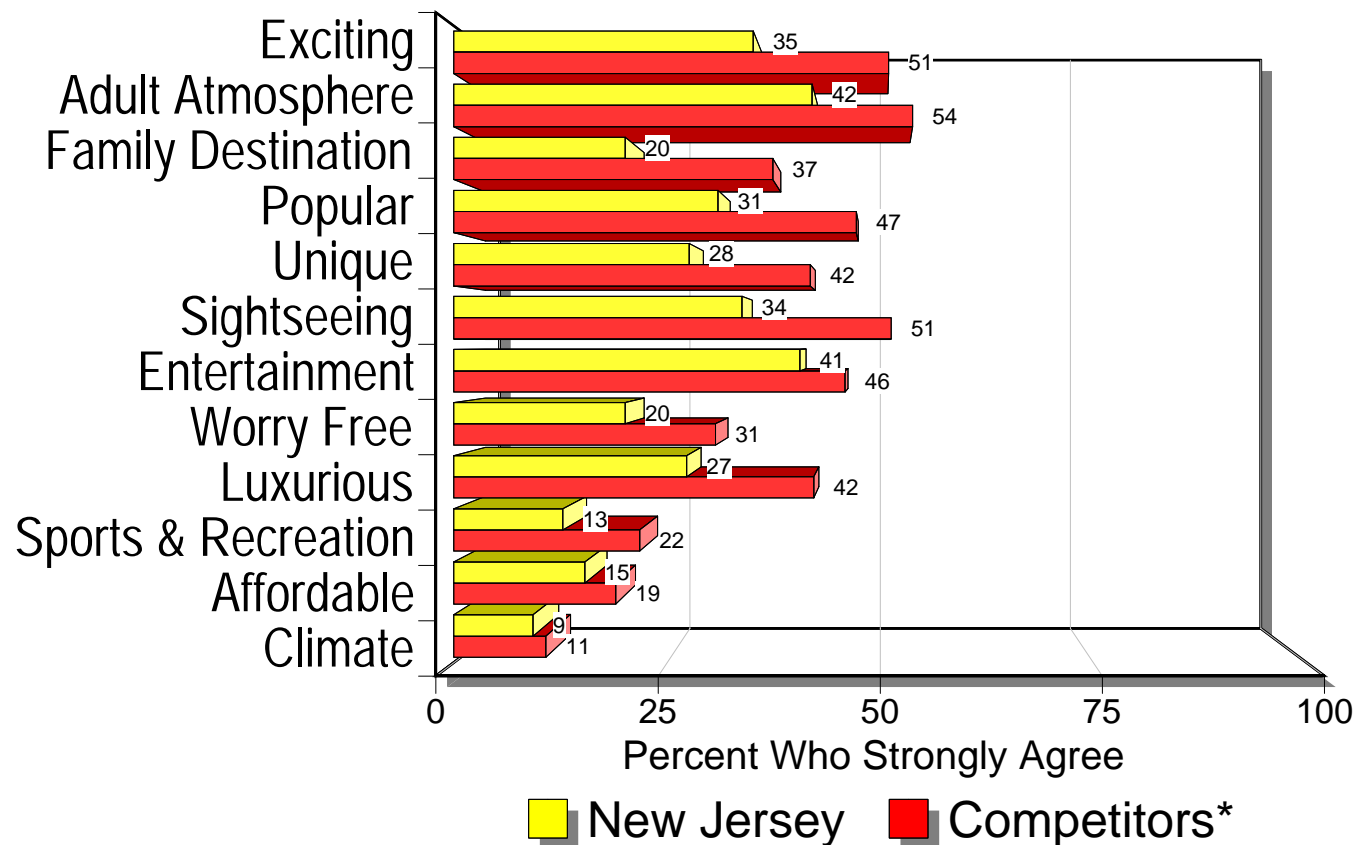
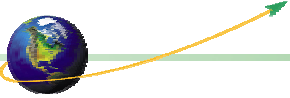
– Mid-Atlantic Markets



*Includes New York, Pennsylvania, Delaware

New Jersey's Image vs. Competitors

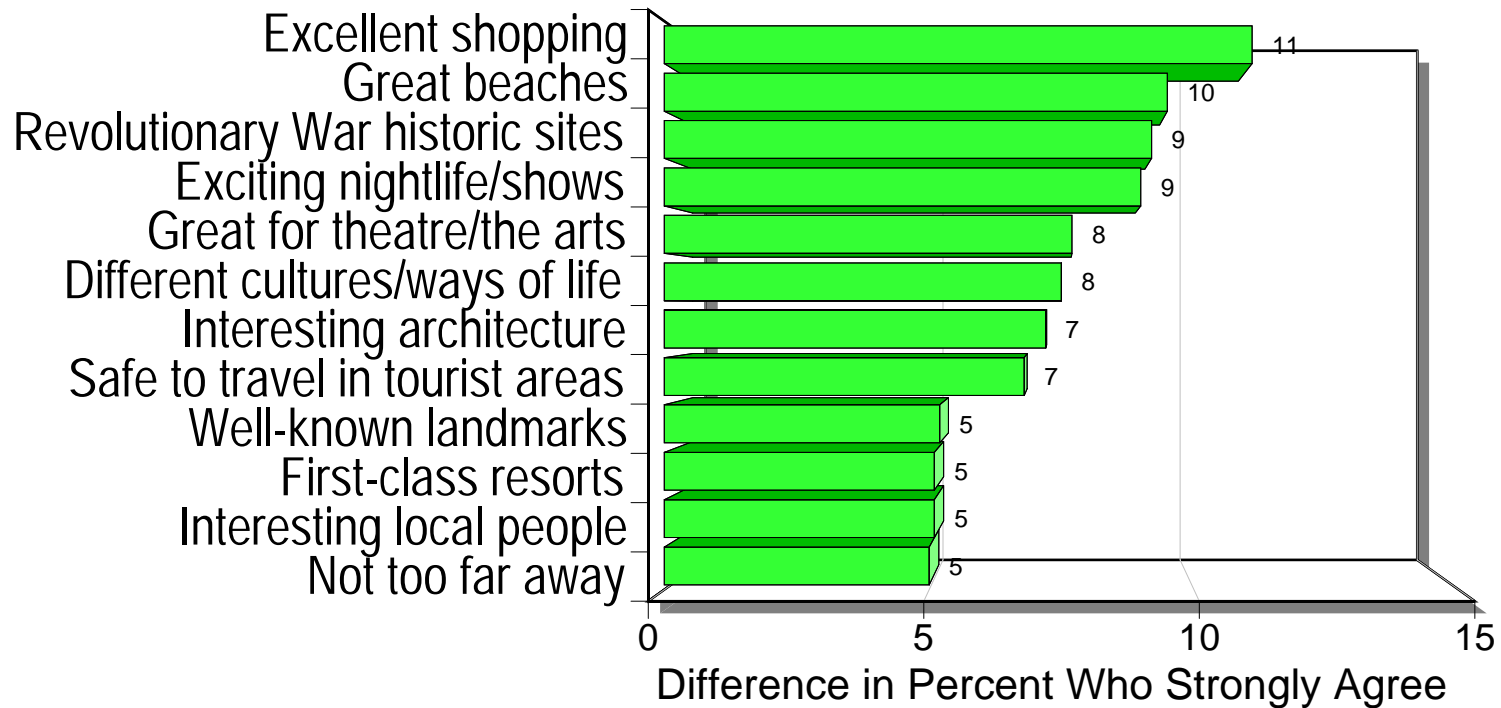
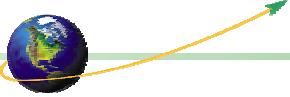
– Other U.S. Markets



*Includes New York, Pennsylvania, Delaware

New Jersey's Image Gains Vs. Competitors*

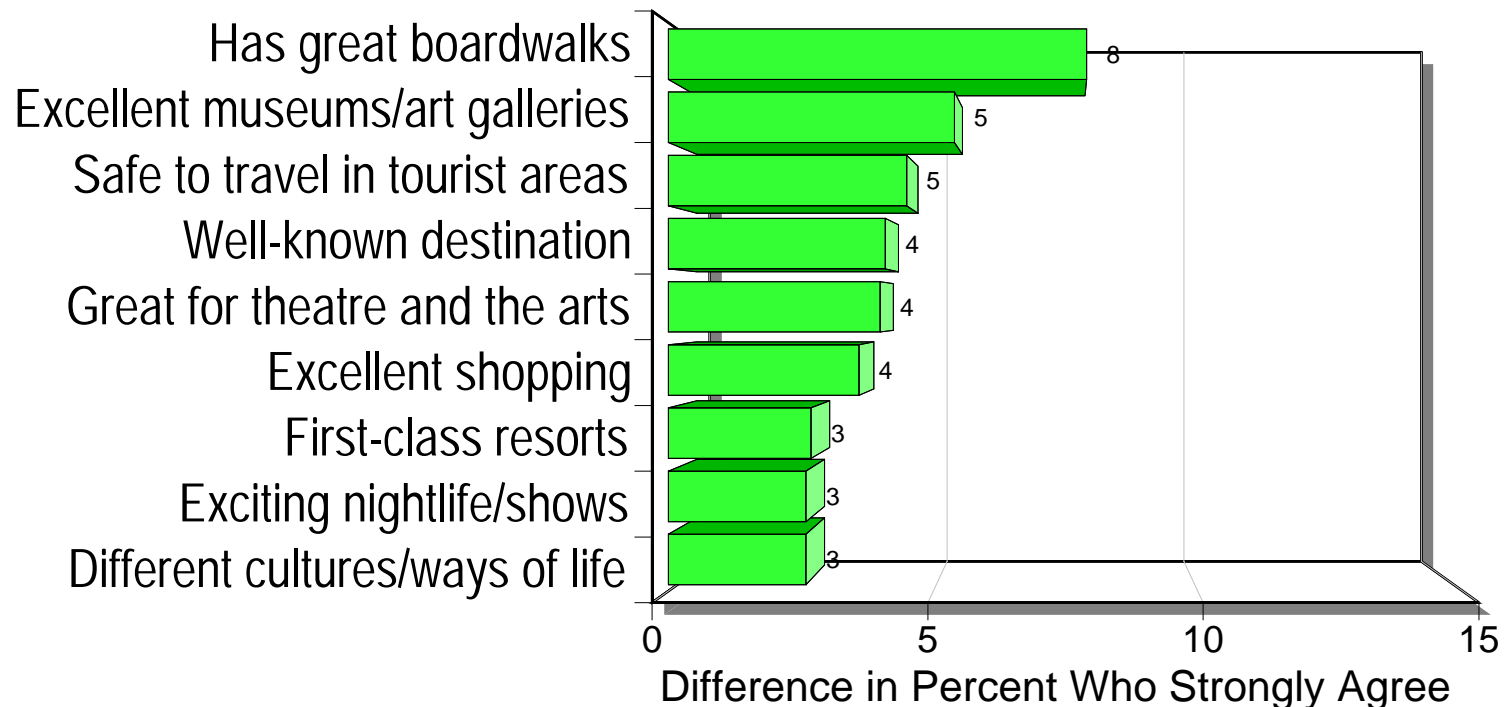
— Mid-Atlantic Markets, 2001 vs. 2000



*Includes New York, Pennsylvania, Delaware

New Jersey's Image Gains Vs. Competitors*

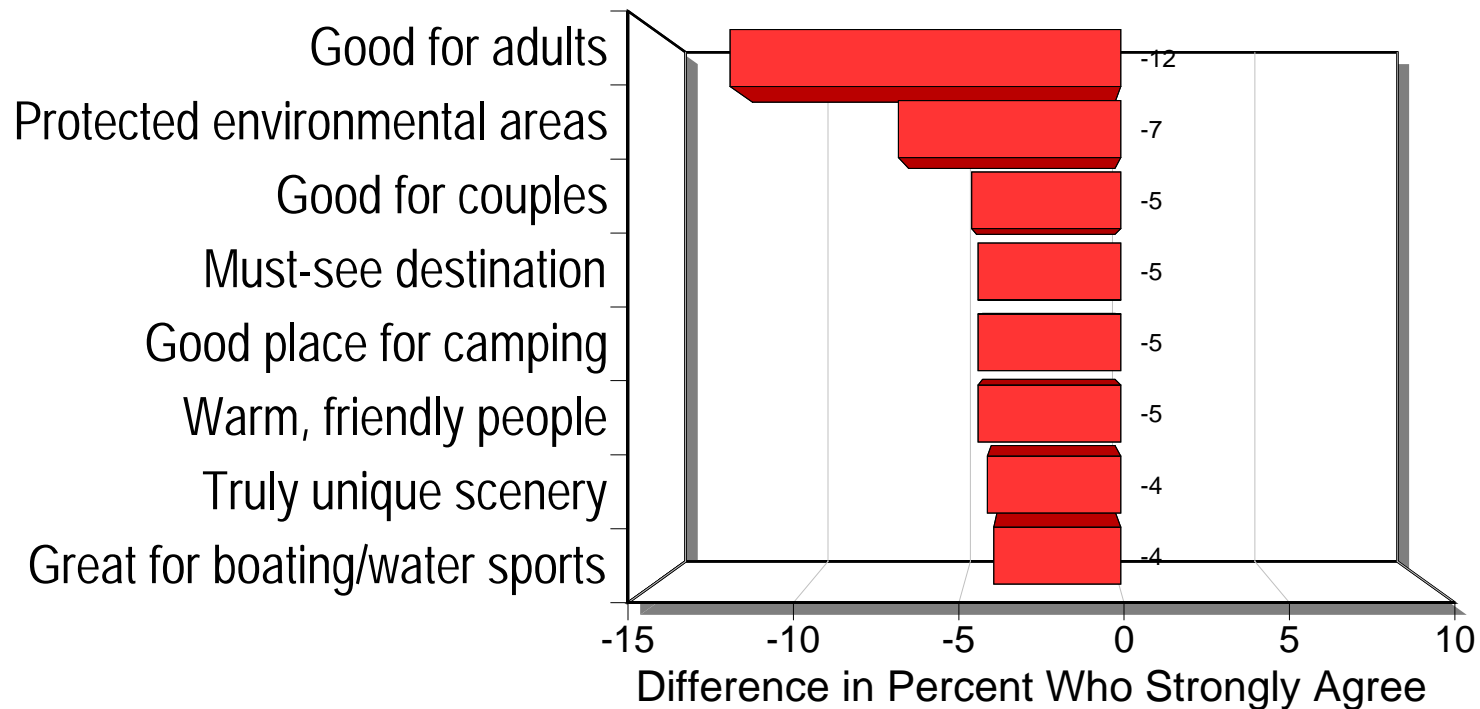
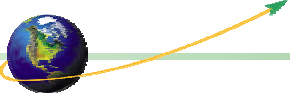
– Other U.S. Markets, 2001 vs. 2000



*Includes New York, Pennsylvania, Delaware

New Jersey's Image Losses Vs. Competitors*

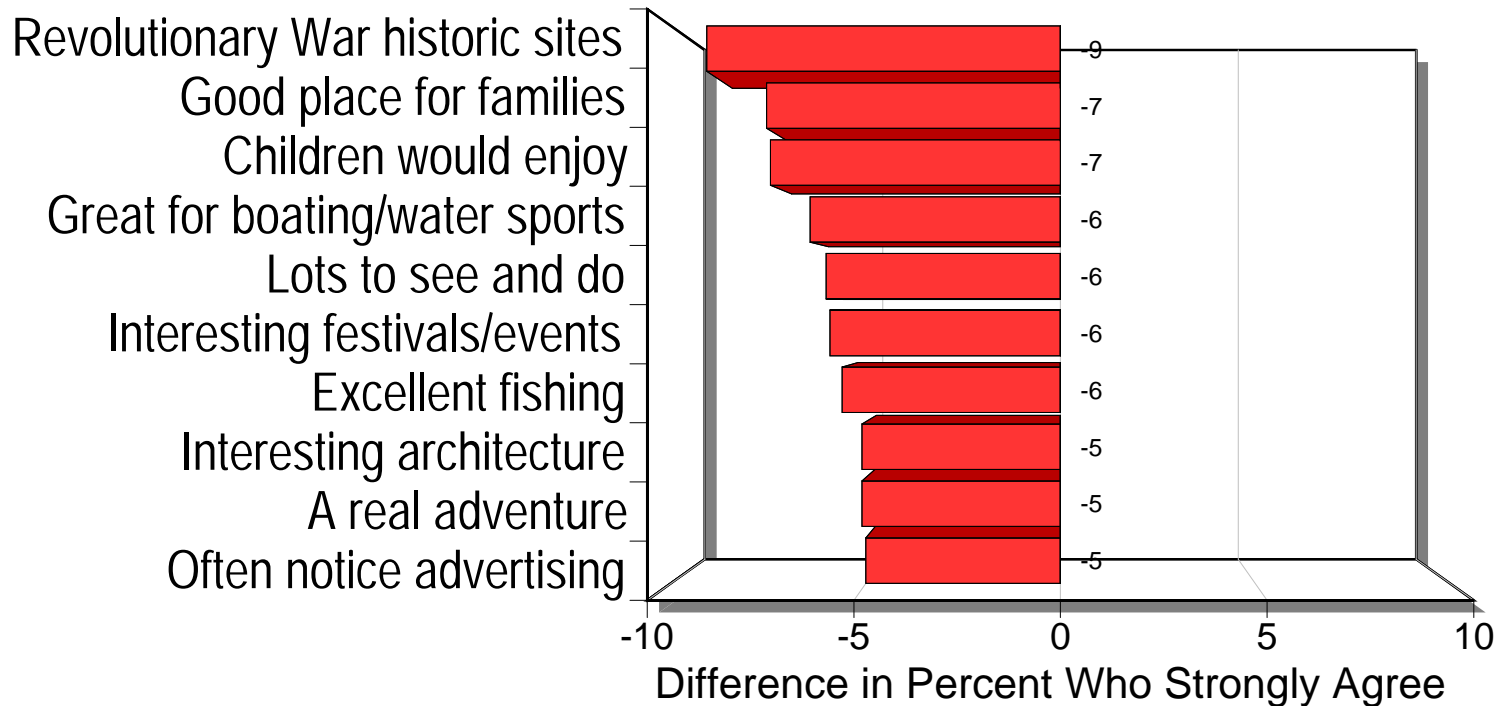
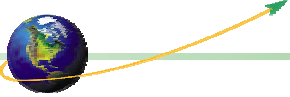
— Mid-Atlantic Markets, 2001 vs. 2000



*Includes New York, Pennsylvania, Delaware

New Jersey's Image Losses Vs. Competitors*

— Other U.S. Markets, 2001 vs. 2000

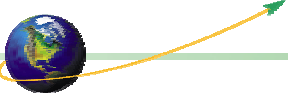


*Includes New York, Pennsylvania, Delaware

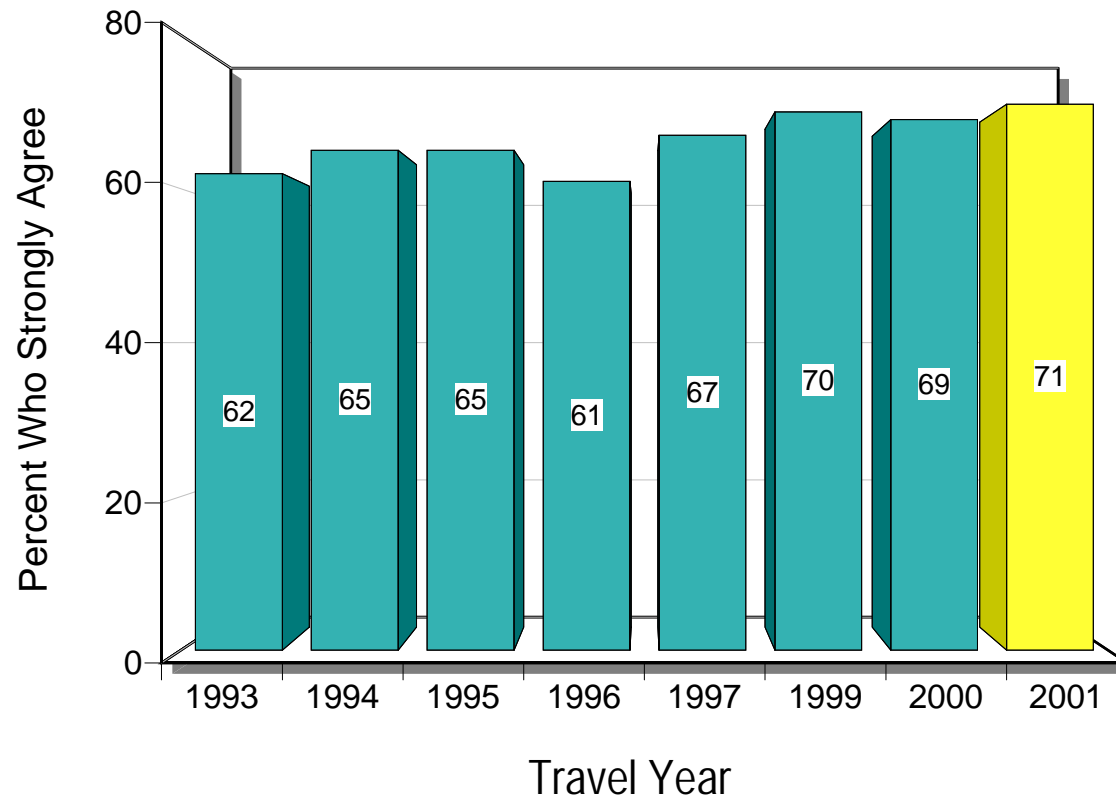


New Jersey's Product Delivery

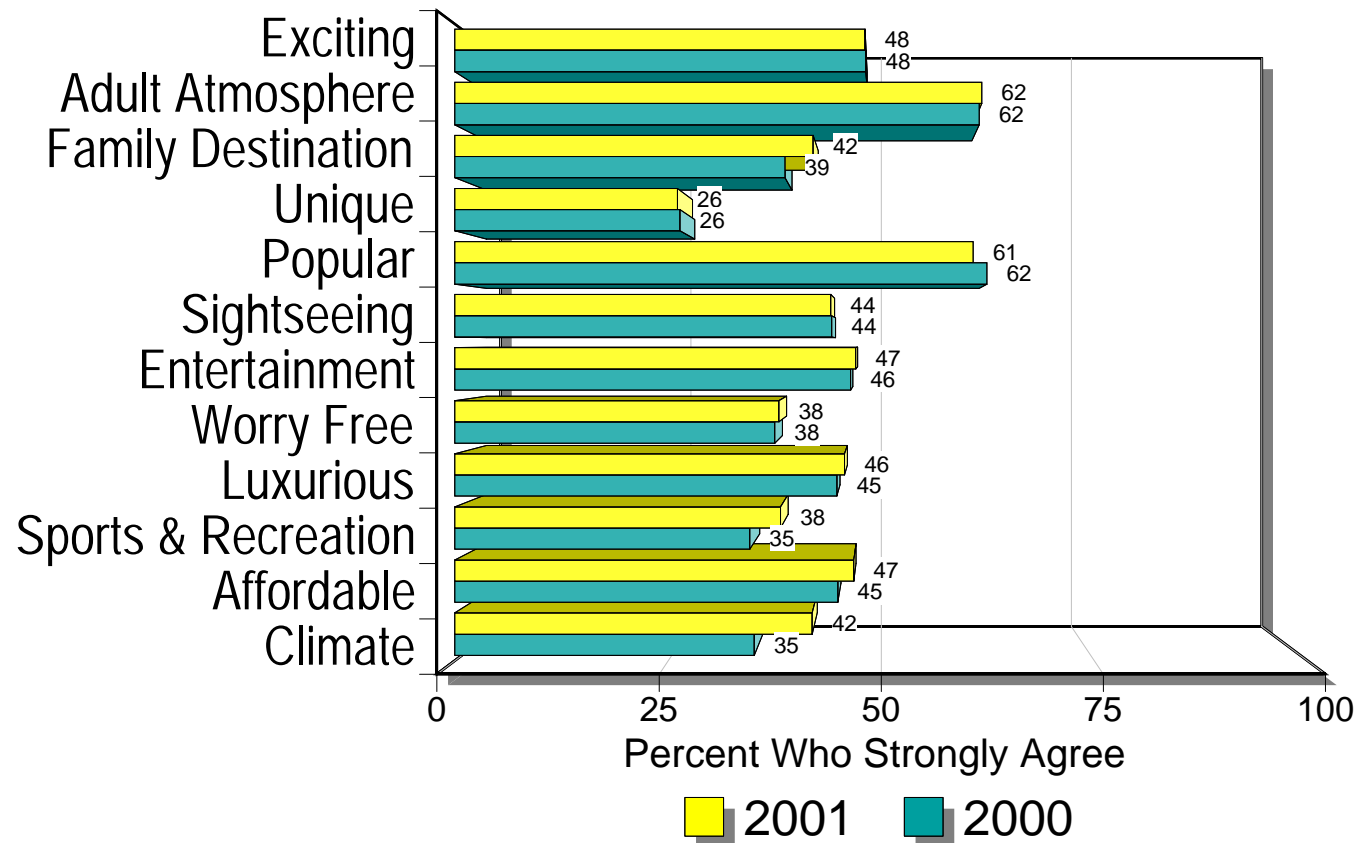
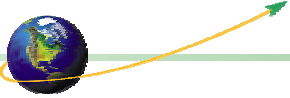
New Jersey's Image as "A Place I Would Really Enjoy Visiting Again"



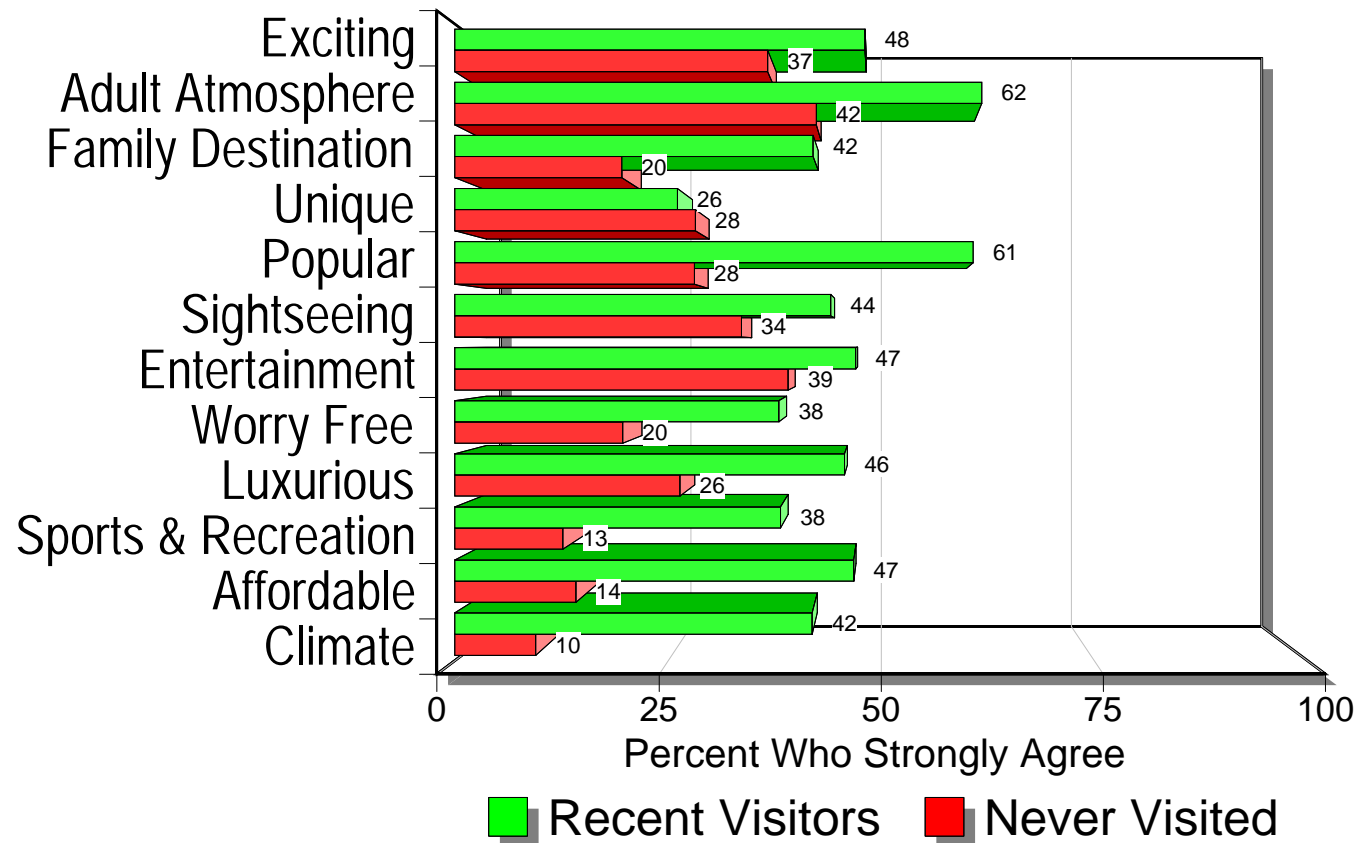
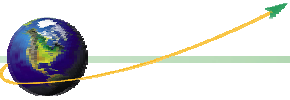
Base: Overnight Pleasure Trips



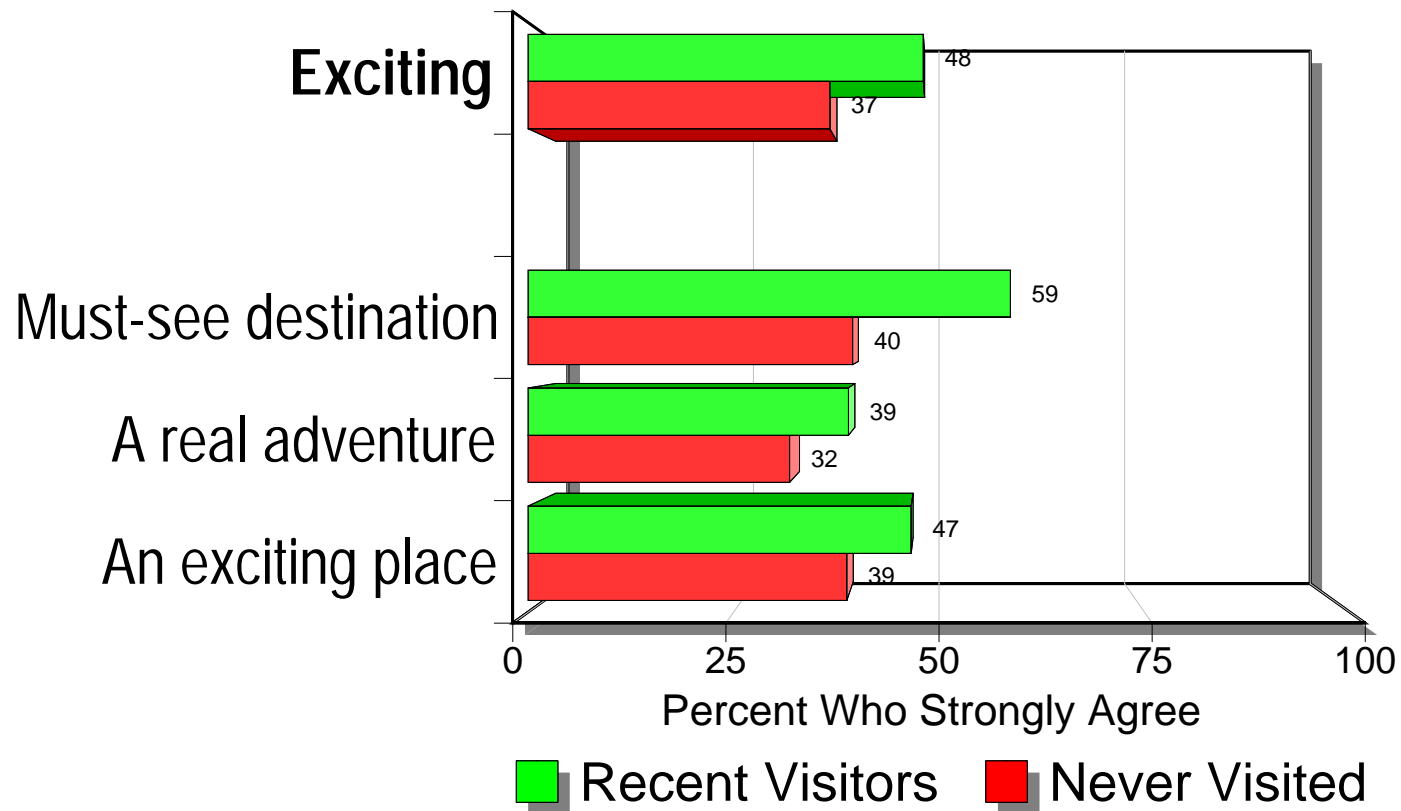
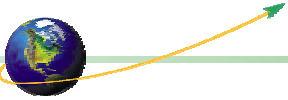
New Jersey's Tourism Product – 2001 vs. 2000



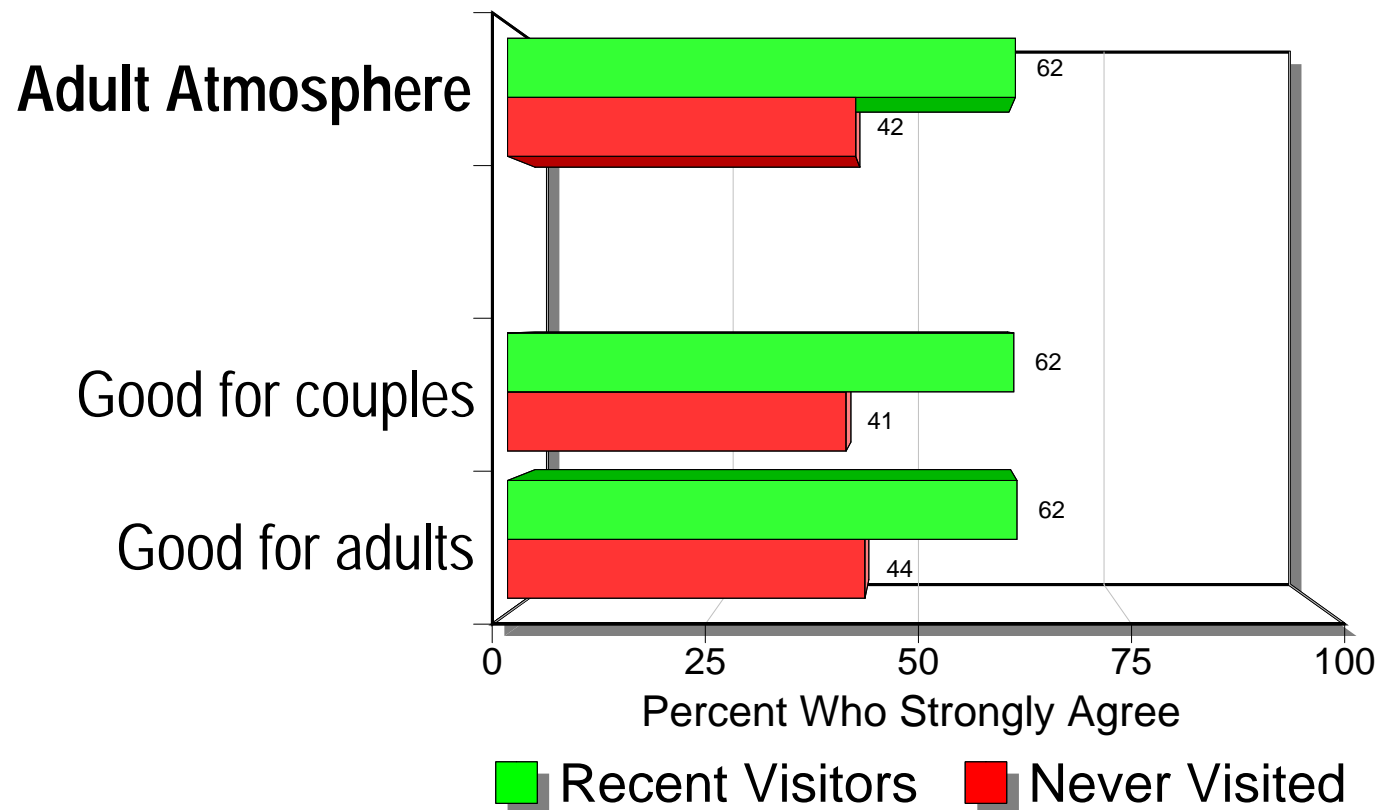
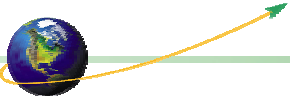
New Jersey's Product vs. Image



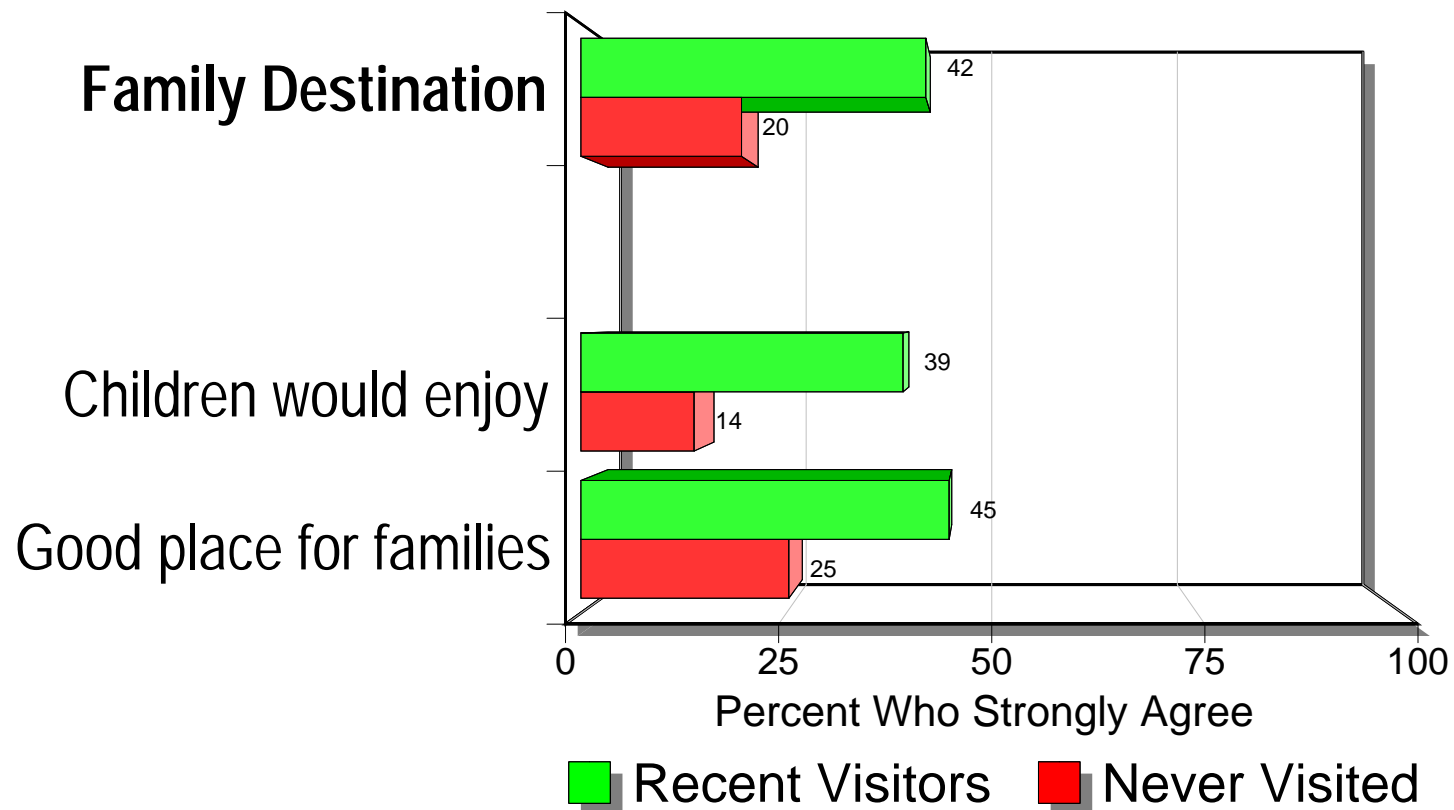
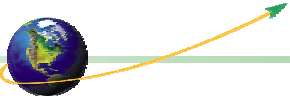
Exciting



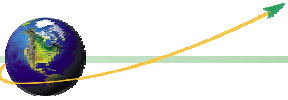
Adult Atmosphere



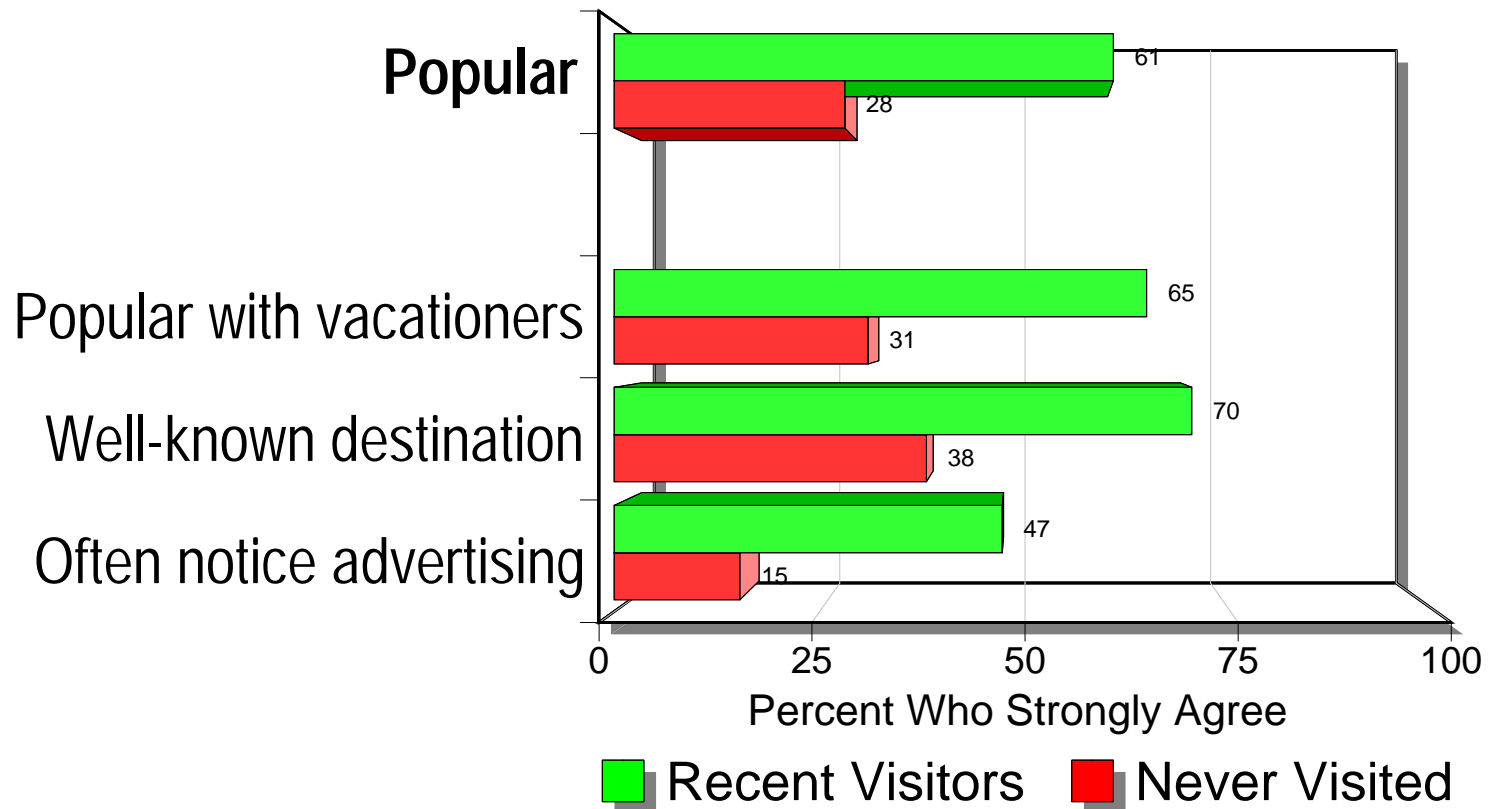
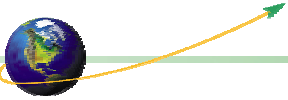
Family Destination



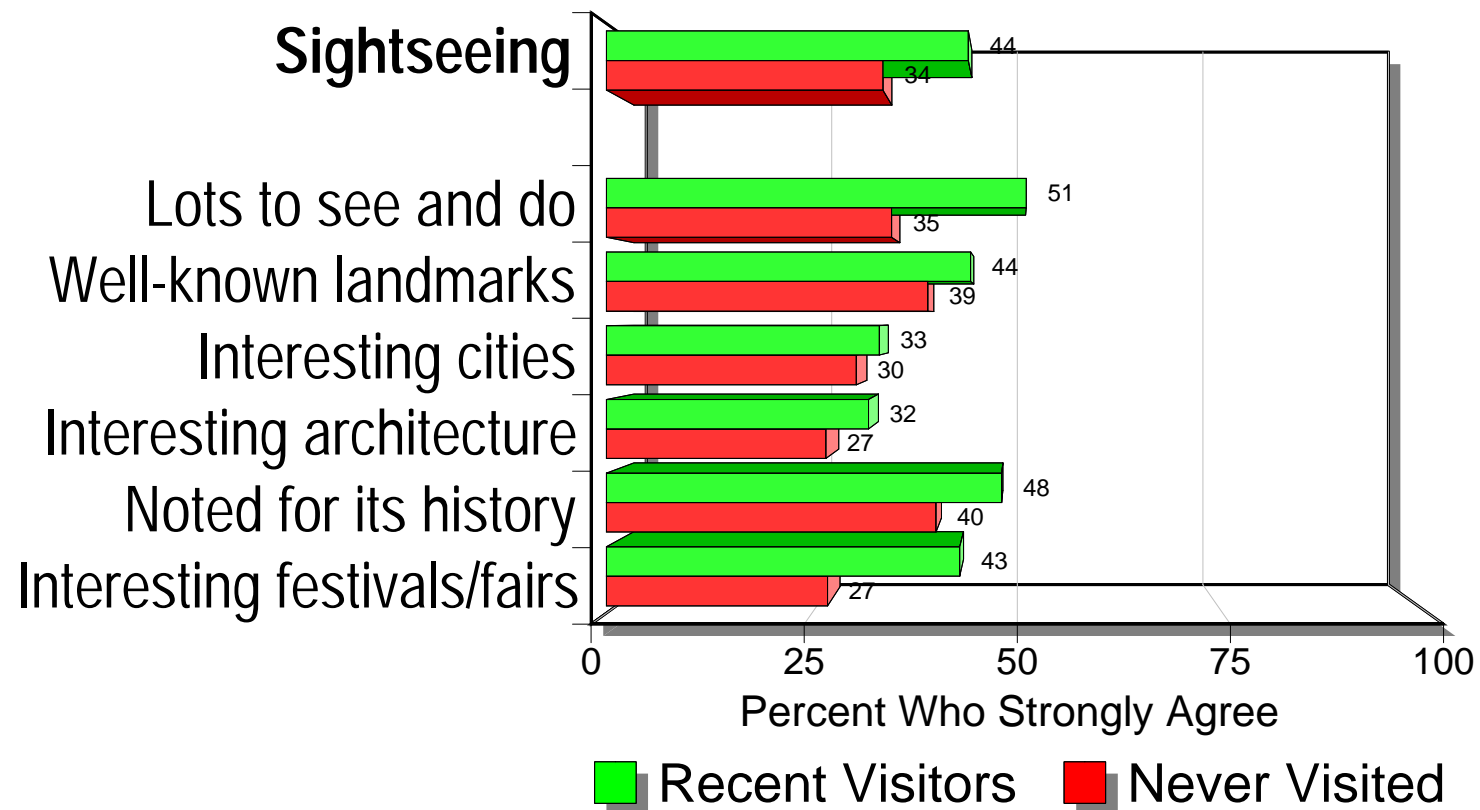
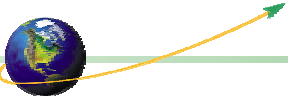
Unique



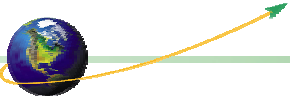
Popular



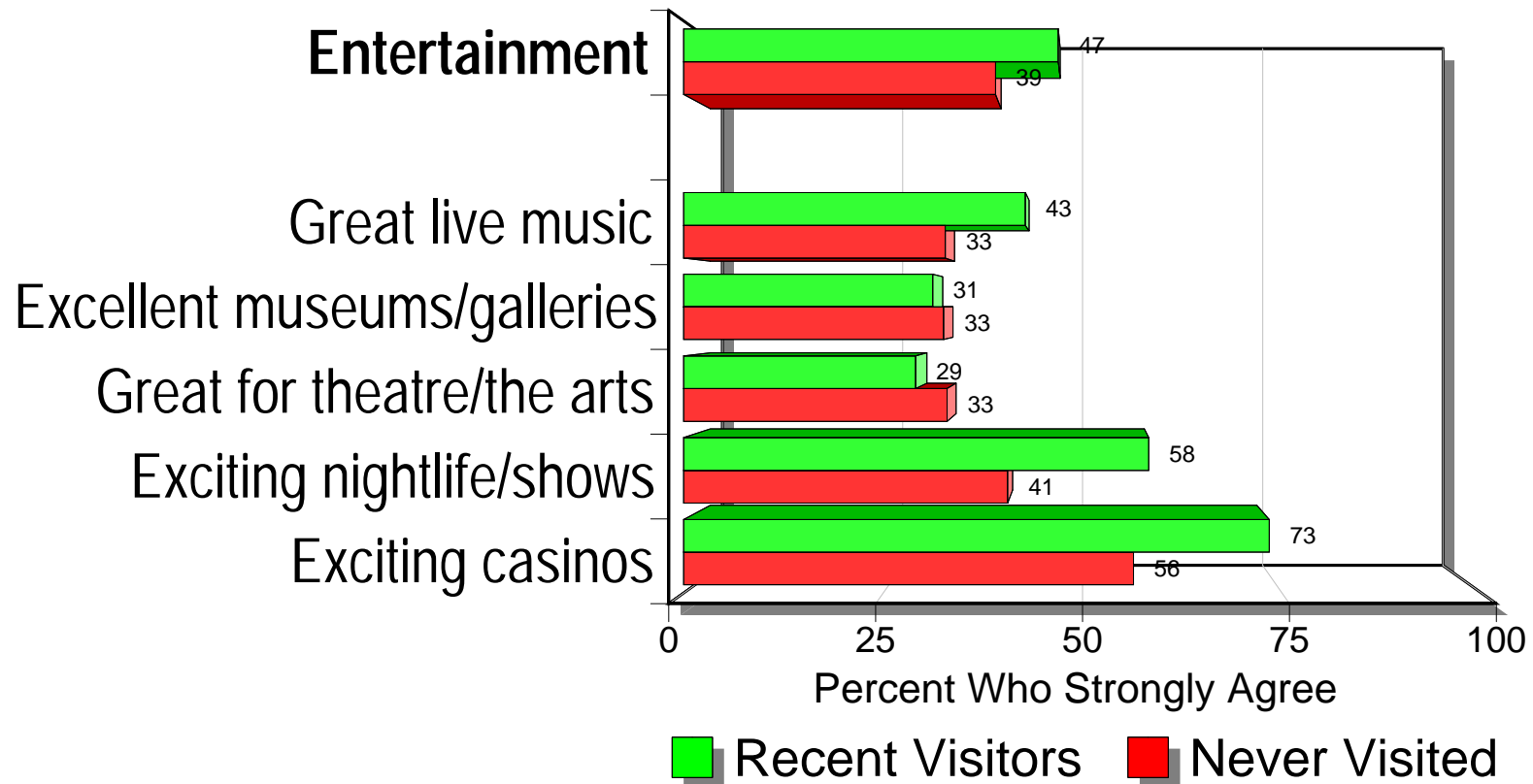
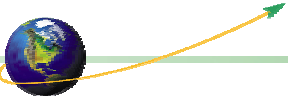
Sightseeing



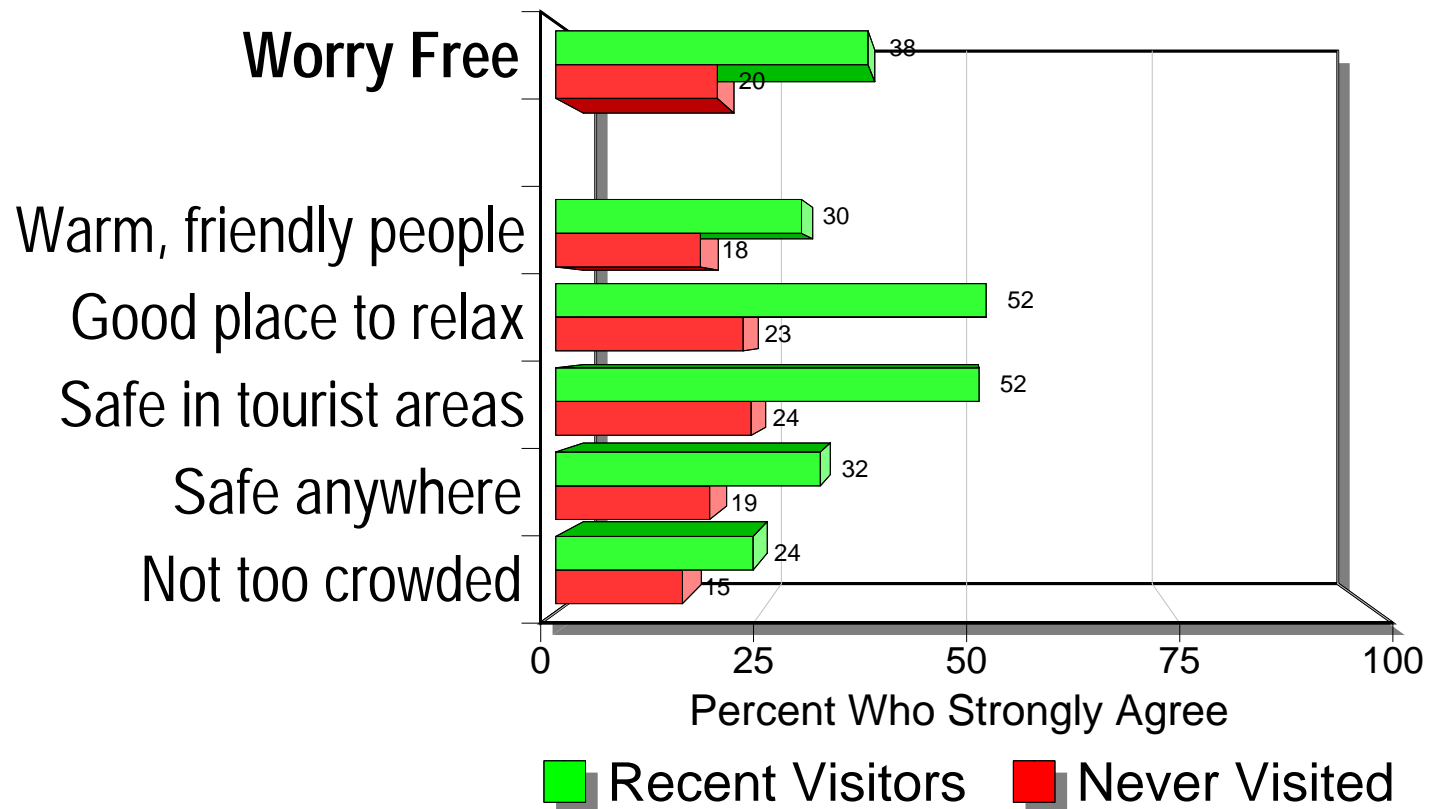
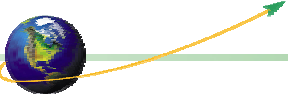
Sightseeing (Cont'd)



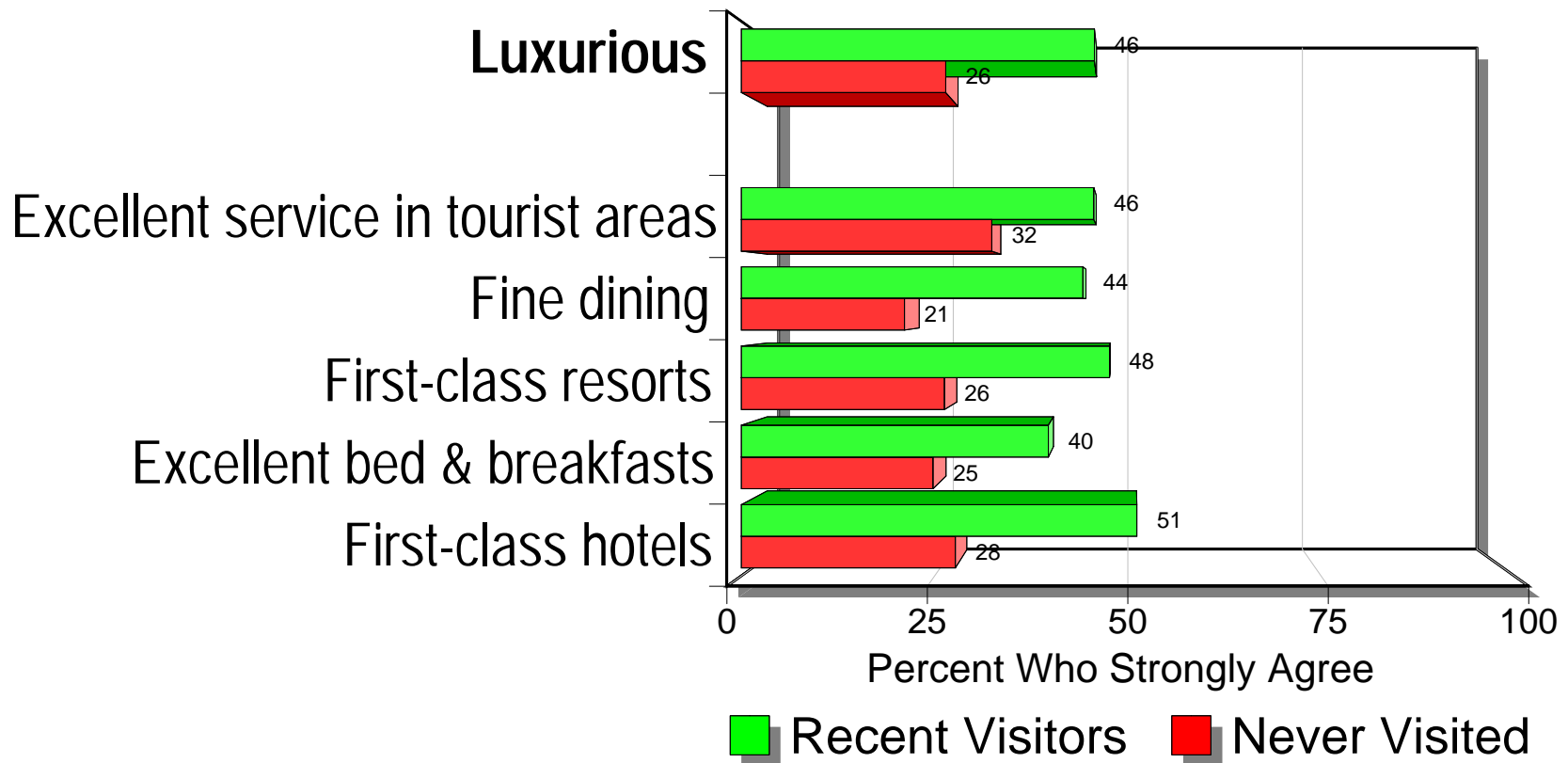
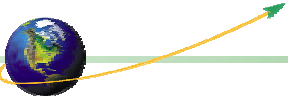
Entertainment



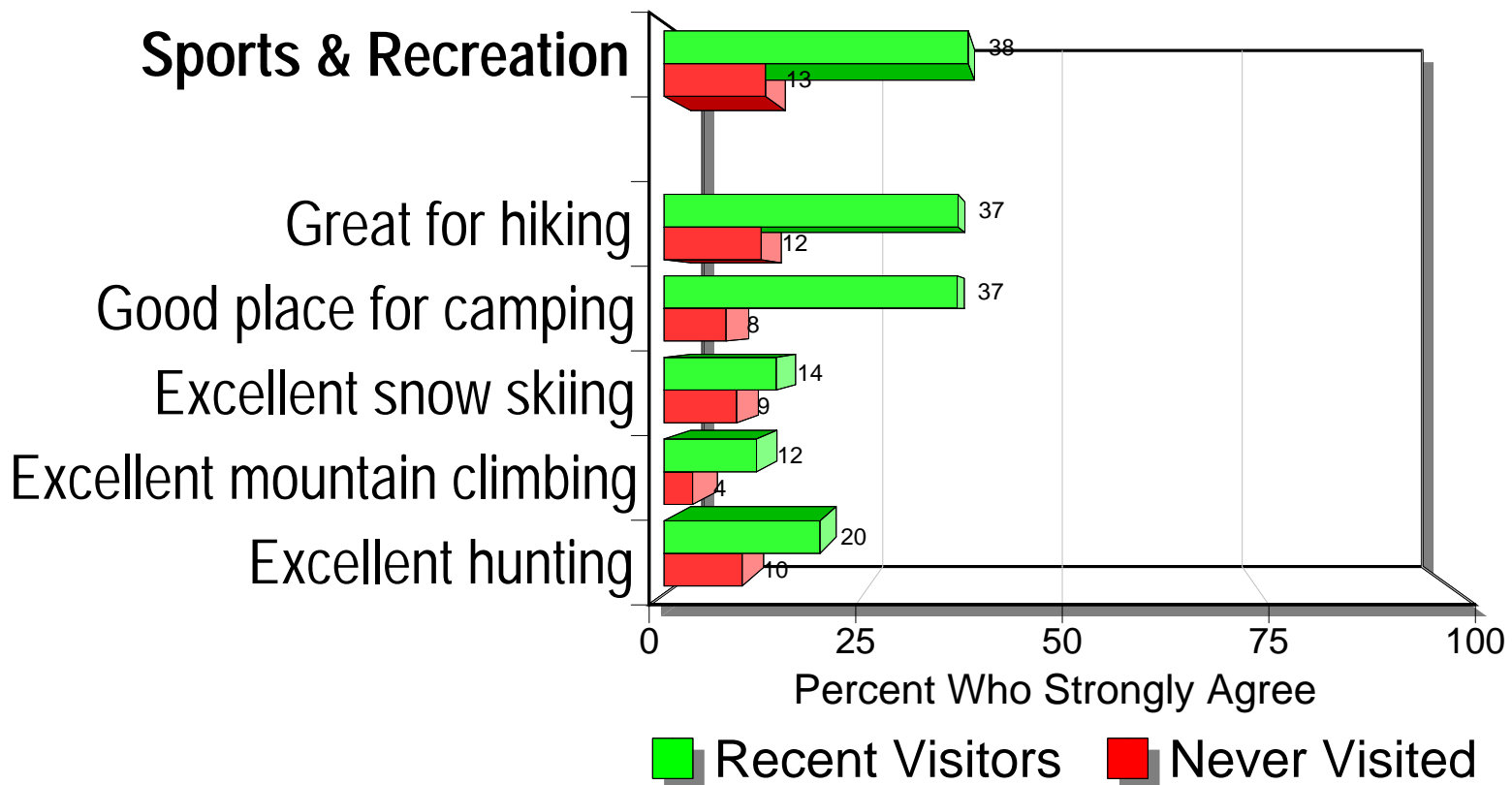
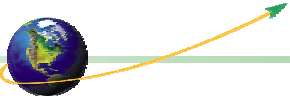
Worry Free



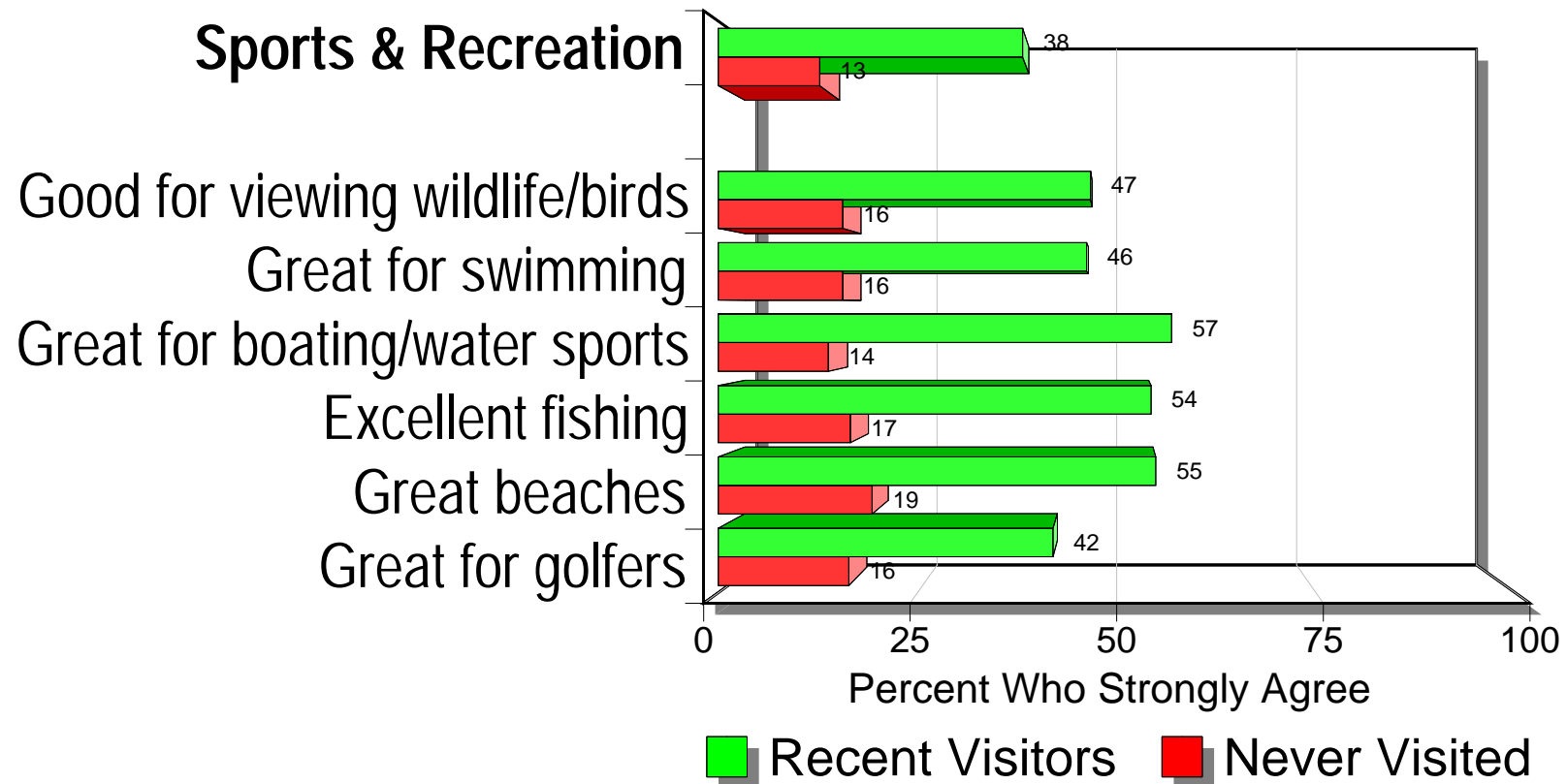
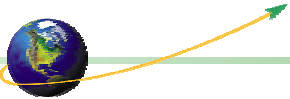
Luxurious



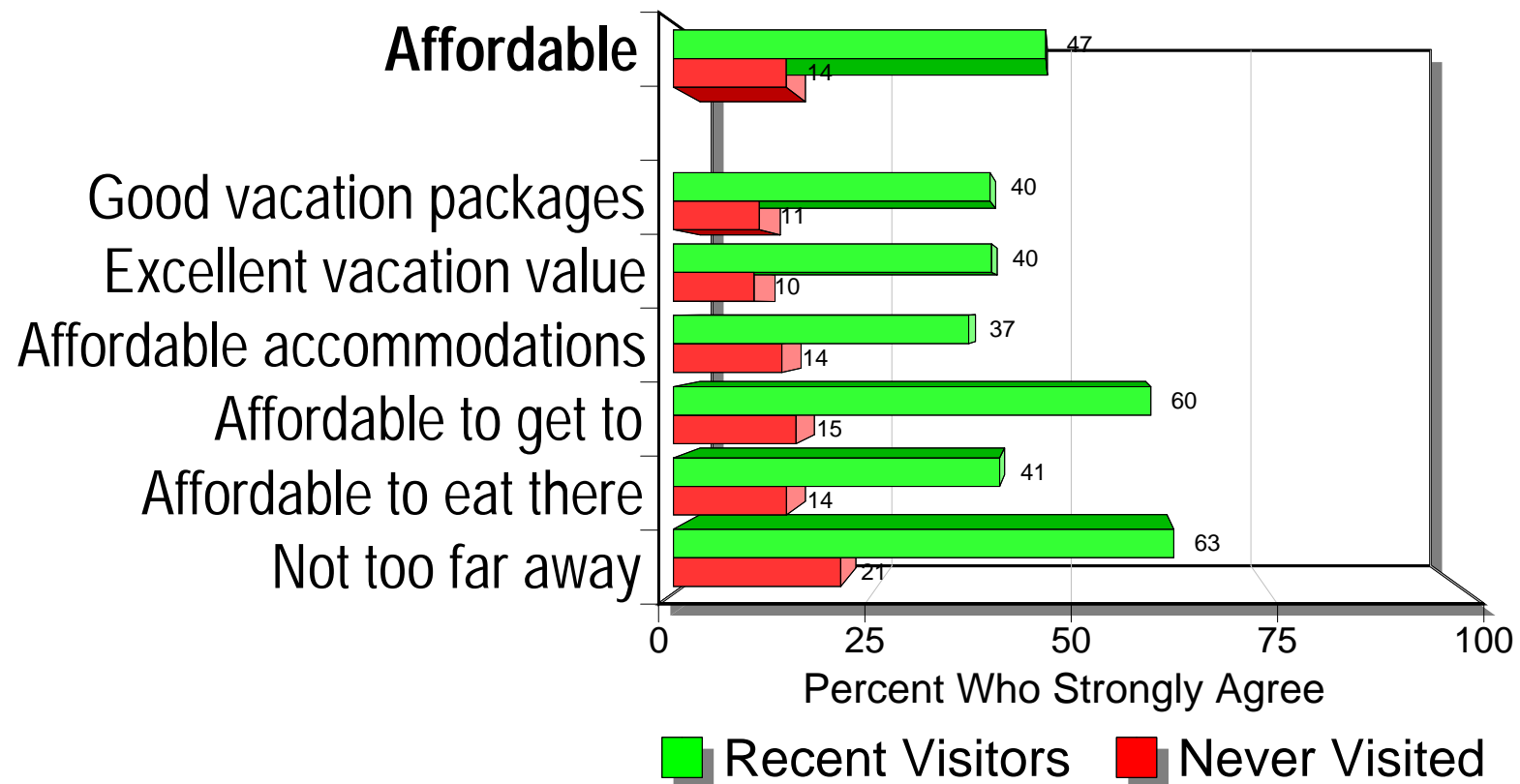
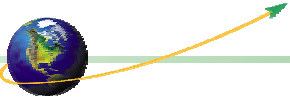
Sports & Recreation



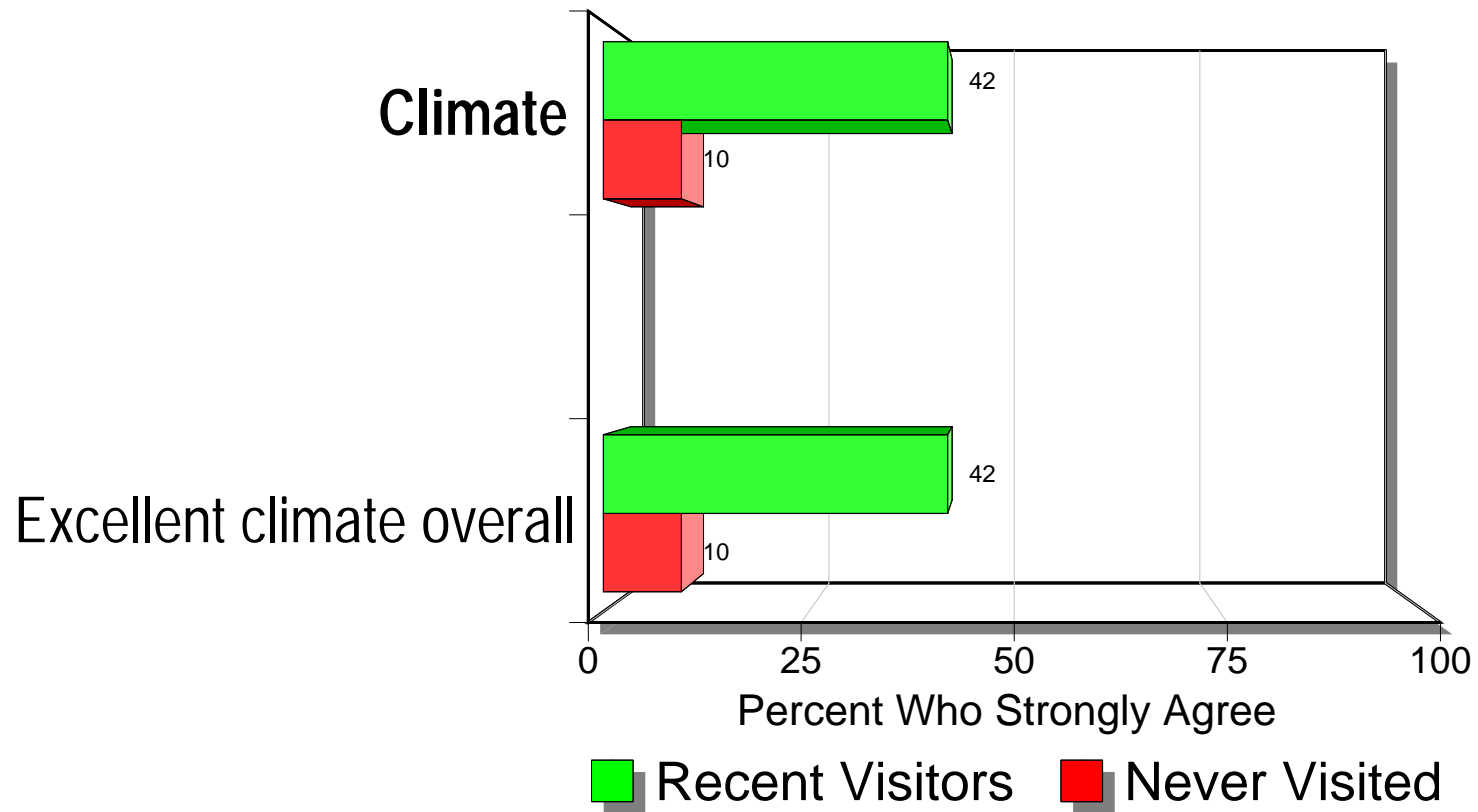
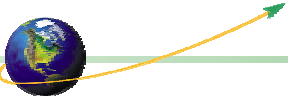
Sports & Recreation (Cont'd)



Affordable

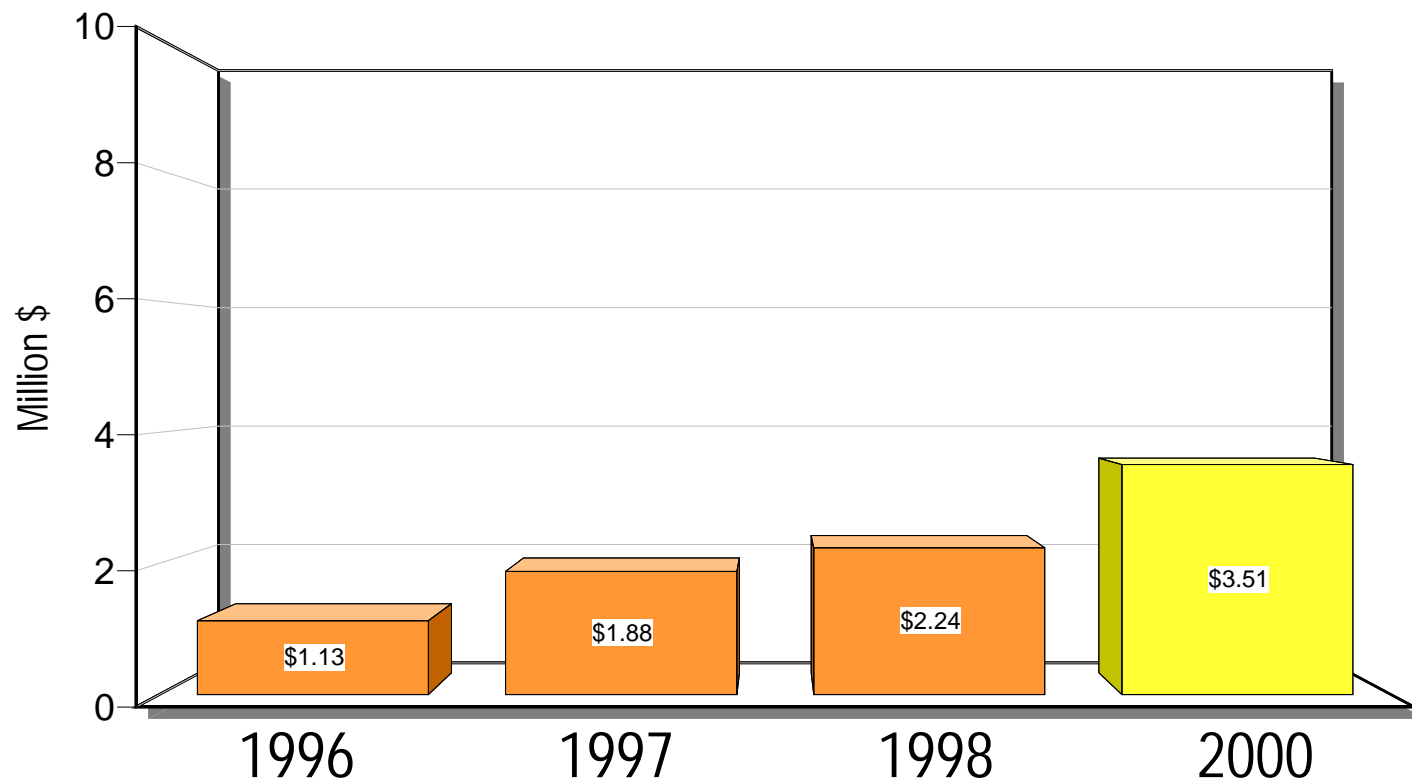
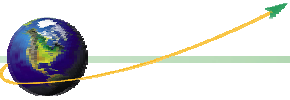


Climate

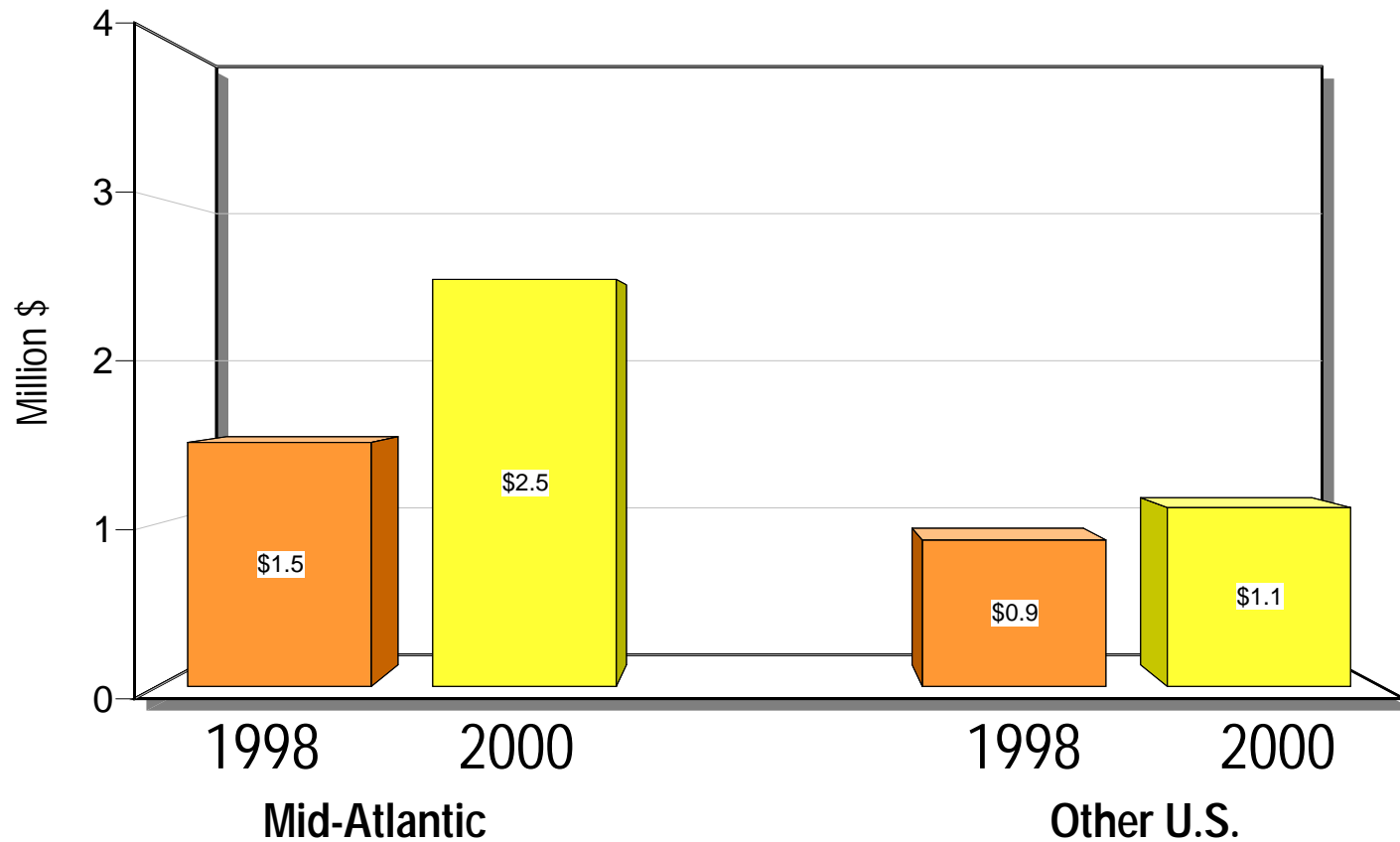
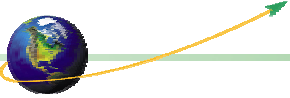


Impact of the 2000 Advertising Campaign

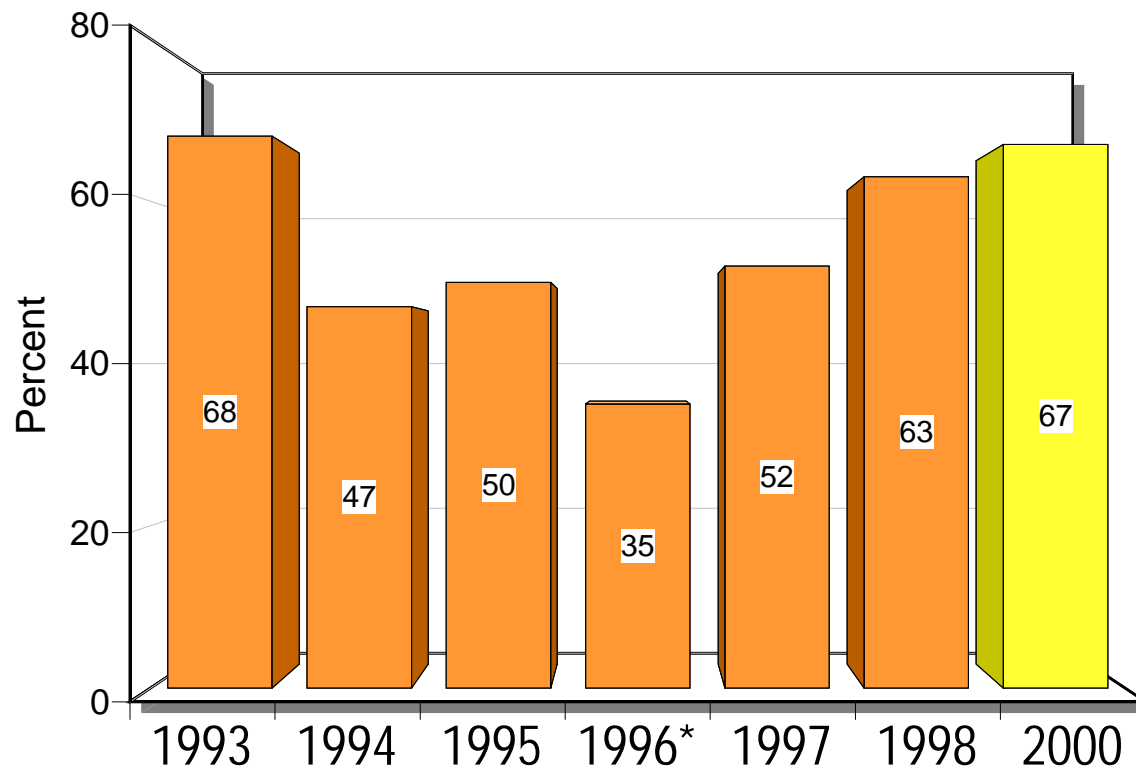
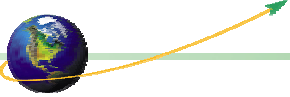
New Jersey Advertising Budget



New Jersey Advertising Budget by Market

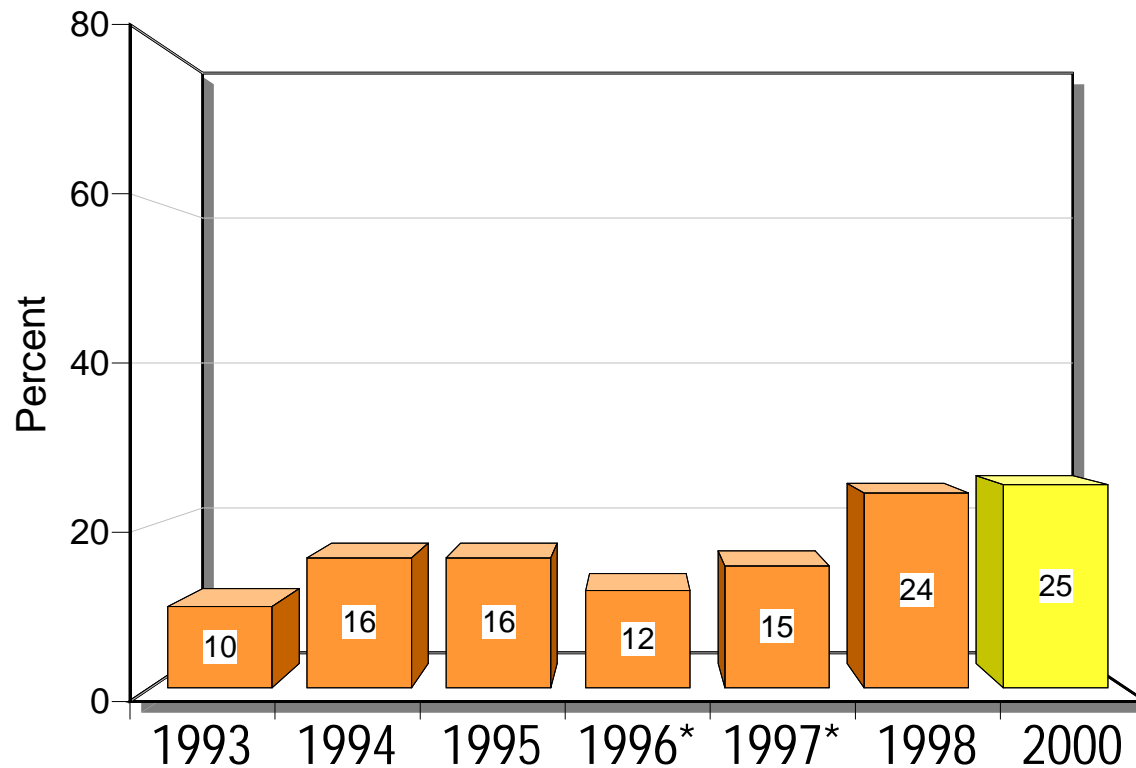
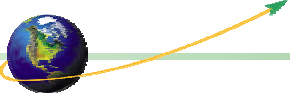


Awareness of New Jersey's Advertising -- Mid-Atlantic Markets



* Print only

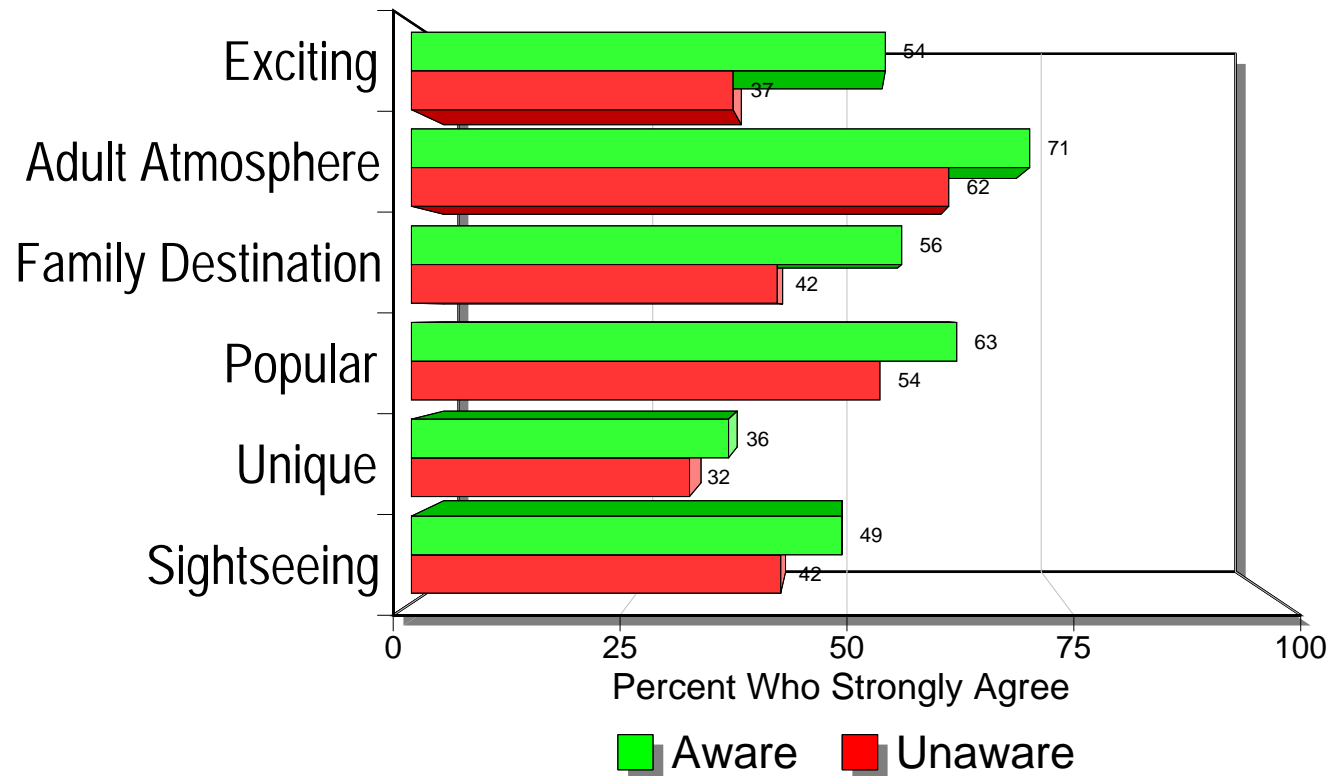
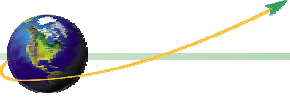
Awareness of New Jersey's Advertising -- Other U.S. Markets



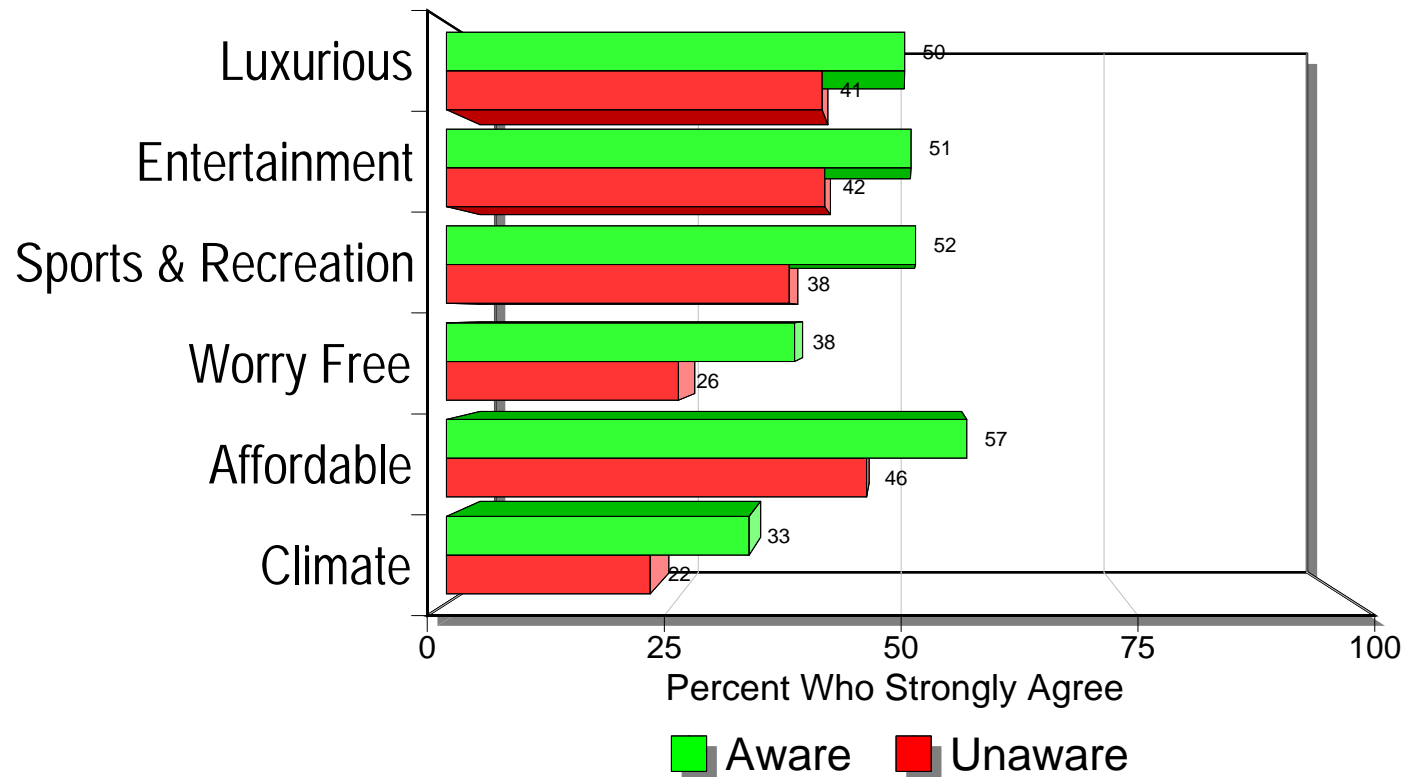
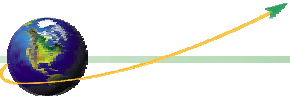
* Print only

Impact of 2000 Advertising on Short-of-Sales Measures

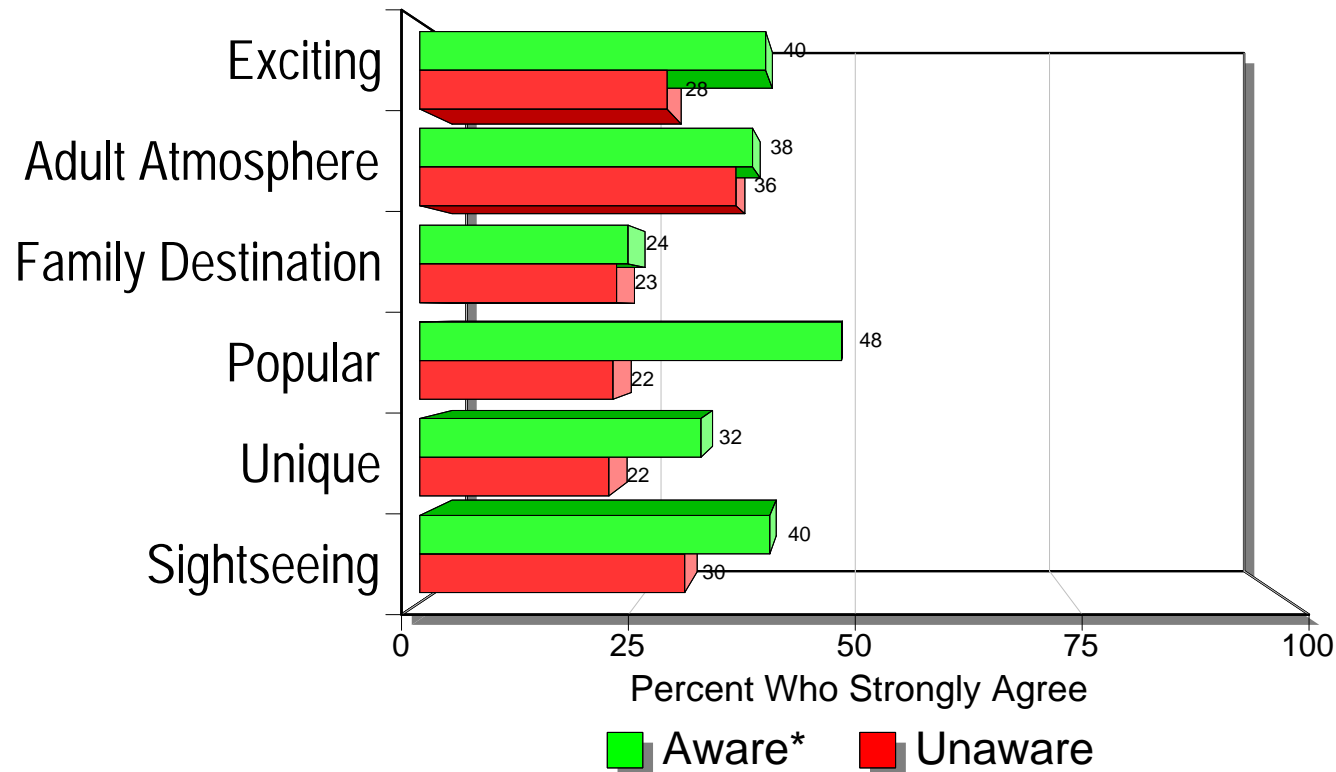
Impact of 2000 Advertising on New Jersey's Image – Mid-Atlantic Markets



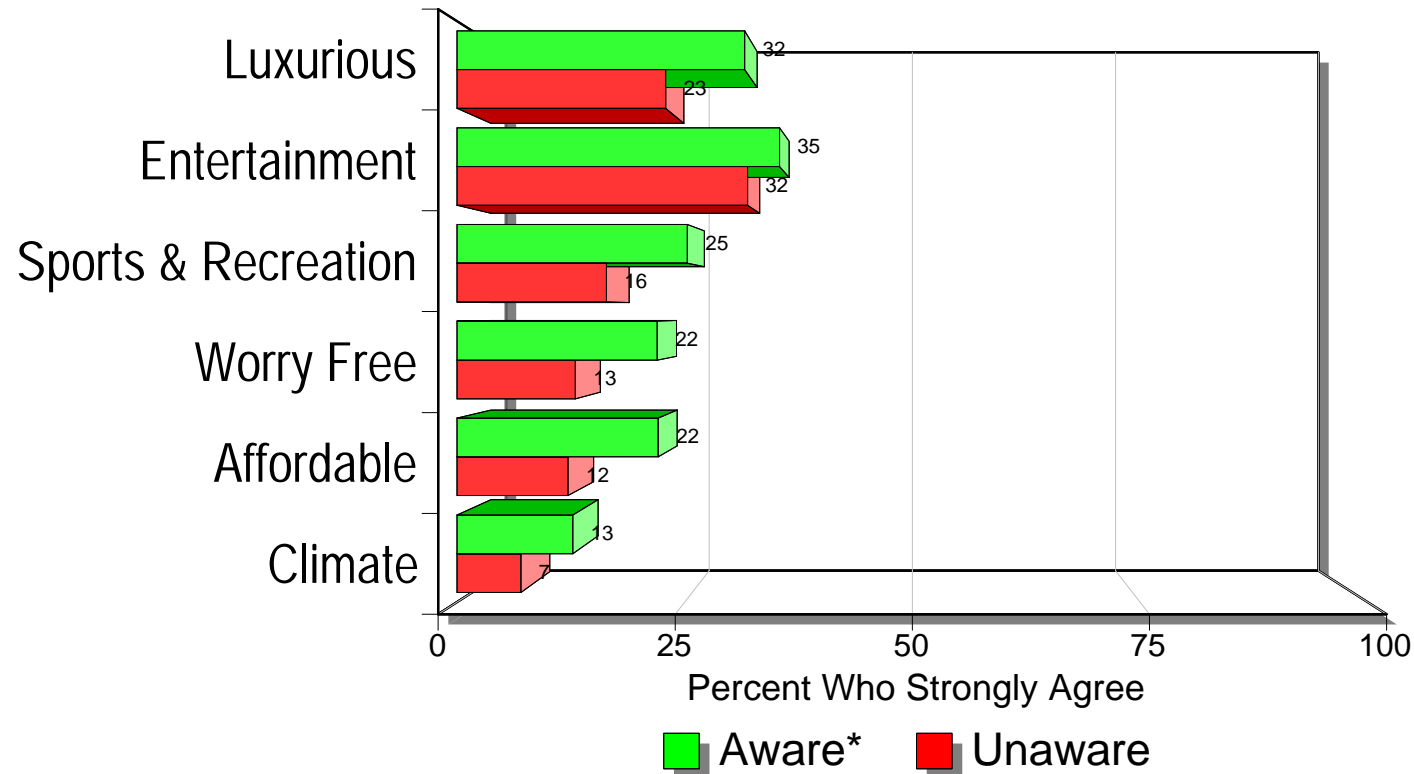
Impact of 2000 Advertising on New Jersey's Image – Mid-Atlantic Markets (Cont'd)



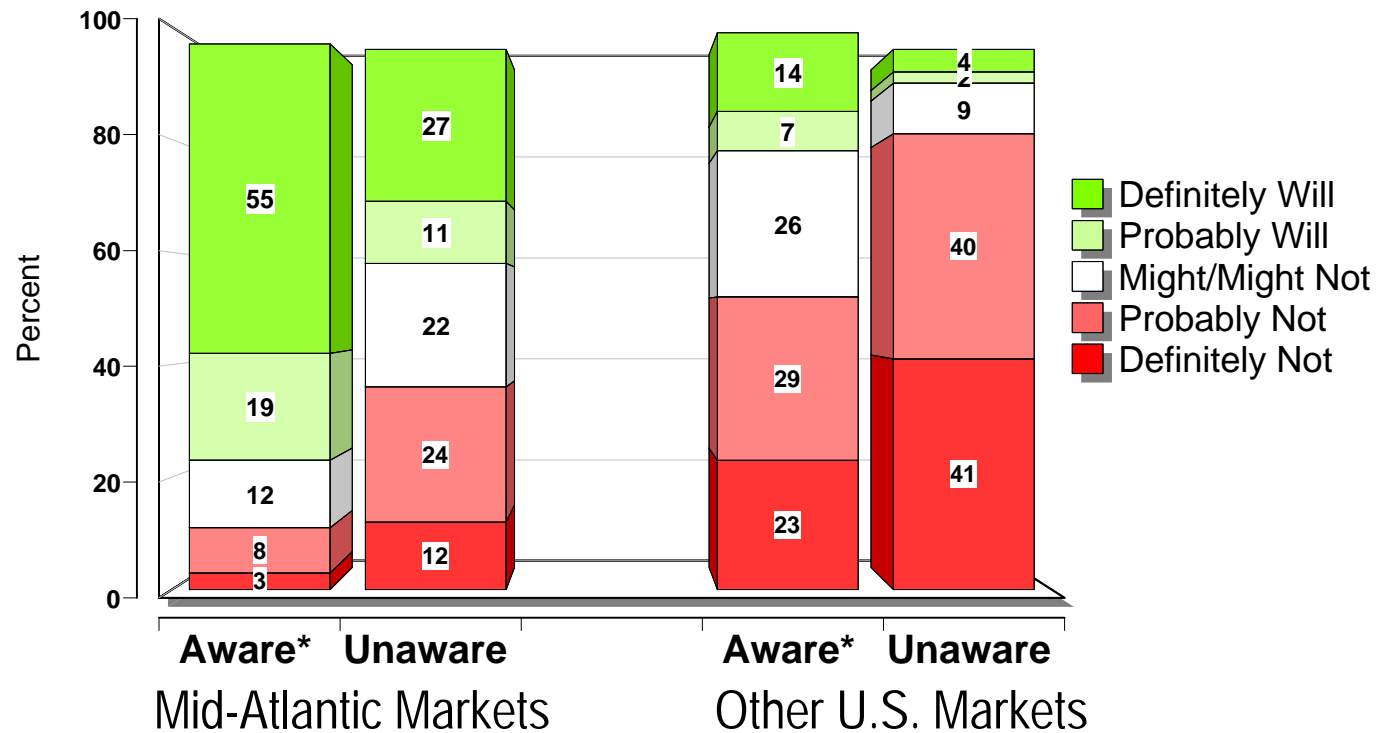
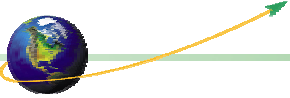
Impact of 2000 Advertising on New Jersey's Image – Other U.S. Markets



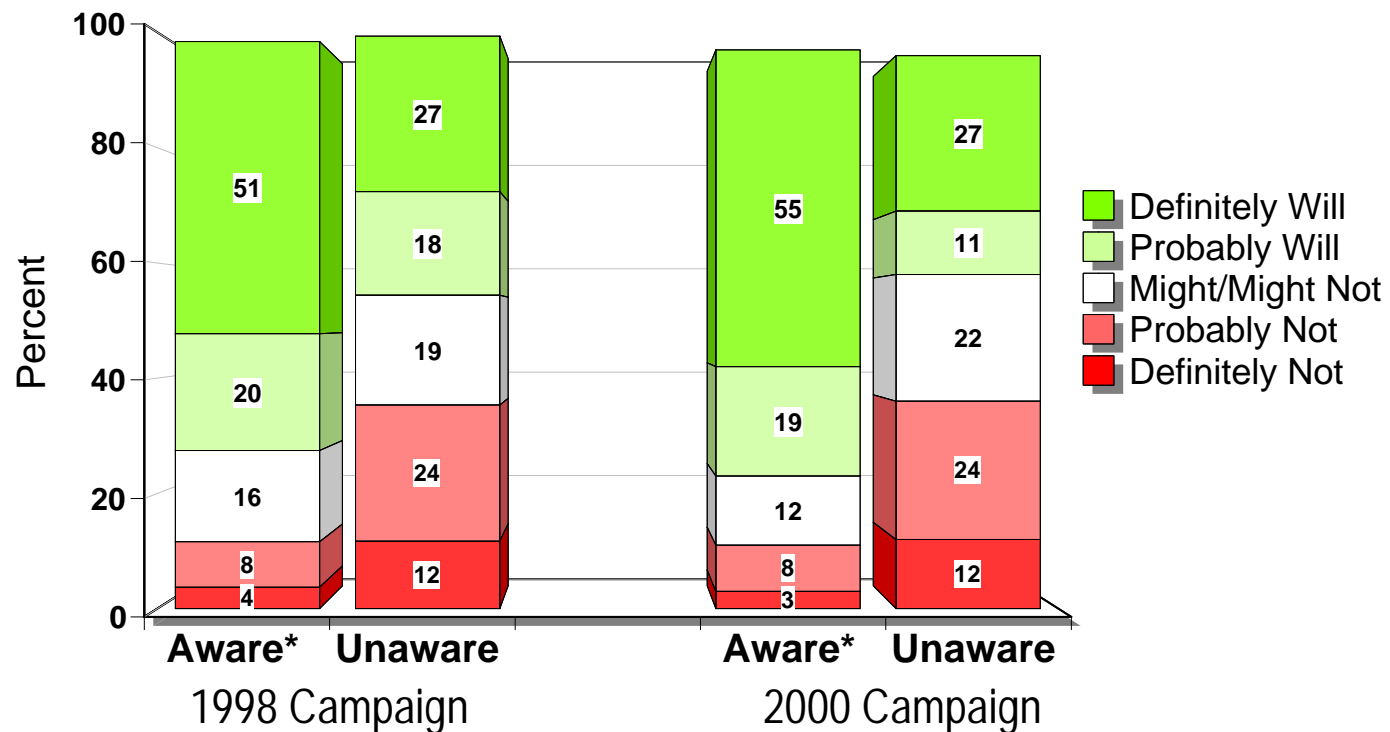
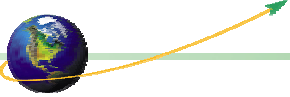
Impact of 2000 Advertising on New Jersey's Image –Other U.S. Markets (Cont'd)



Impact of the 2000 Advertising on Intentions to Visit in 2001

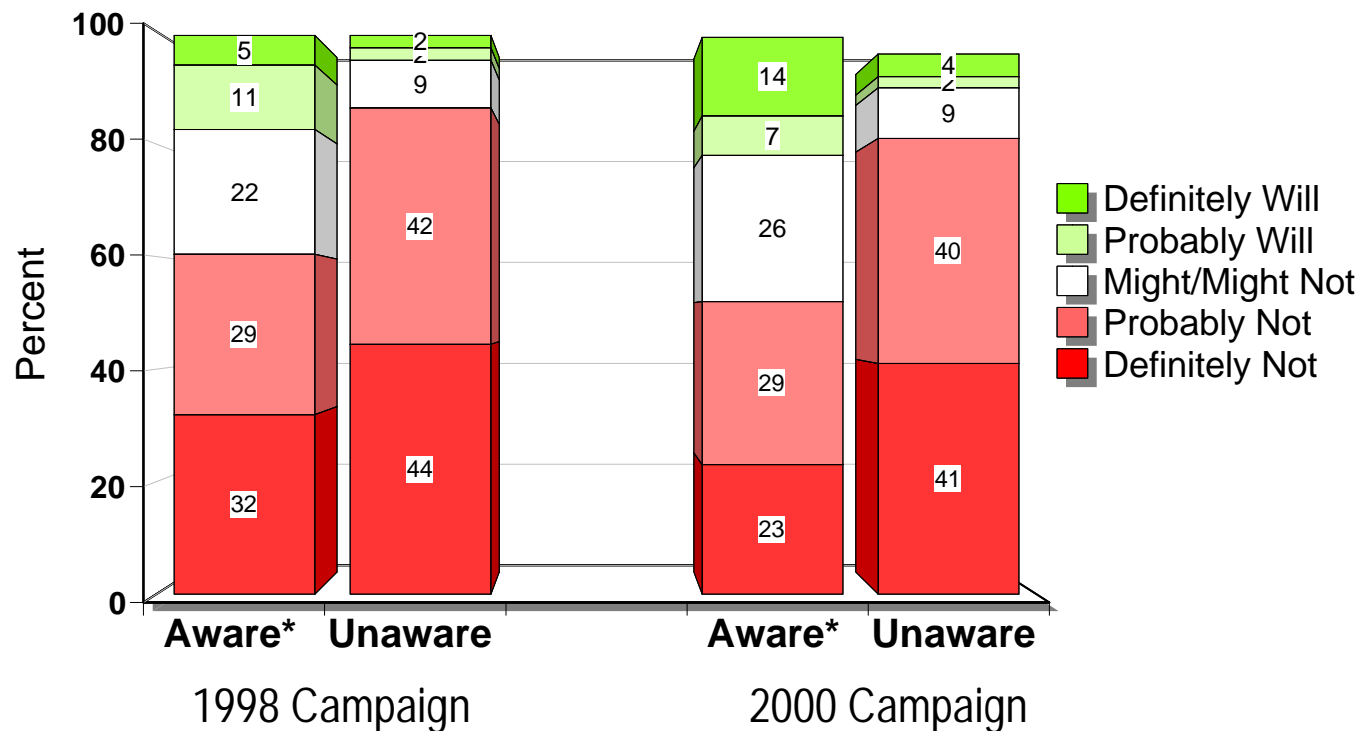
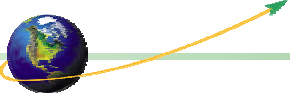


Impact of Advertising in Mid-Atlantic Markets on Intentions to Visit



*Saw at least 1 ad

Impact of Advertising in Other U.S. Markets on Intentions to Visit

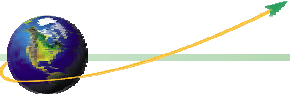


*Saw at least 1 ad



Return on Advertising Investment – 2000 Campaign

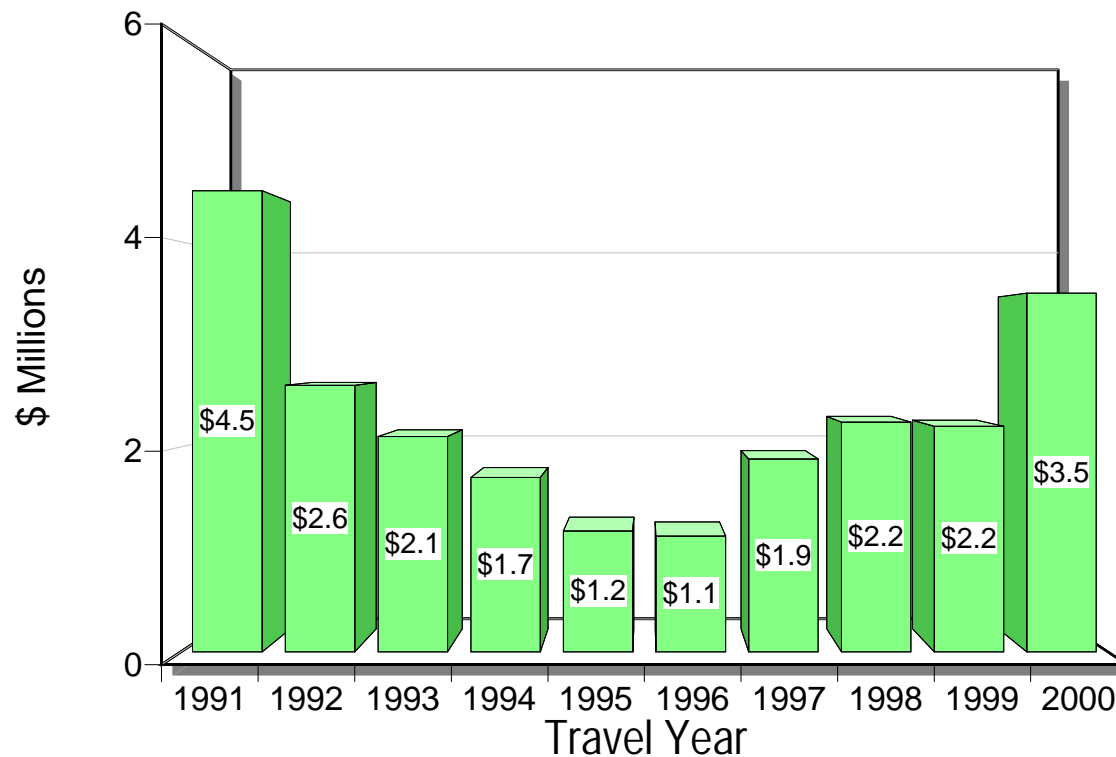
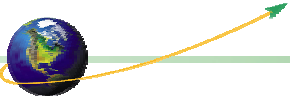
Return on Investment in Advertising



	1999 Travel Year	2001 Travel Year (Projected)	2001 Travel Year (Actual)
Trips Influenced by Advertising (Millions)	4.4	7.0	7.1
Expenditures Influenced by Advertising (\$Millions)	\$406	\$734	\$793
Taxes Influenced by Advertising (\$Millions)	\$52	\$93	\$98
Media Budget (\$Millions)	\$2.2	\$3.5	\$3.5
Trips Per Dollar Invested	1.96	1.99	2.03
Return in Travel Expenditures Per Dollar Invested	\$181	\$210	\$227
Return in State Taxes Per Dollar Invested	\$23	\$26	\$28

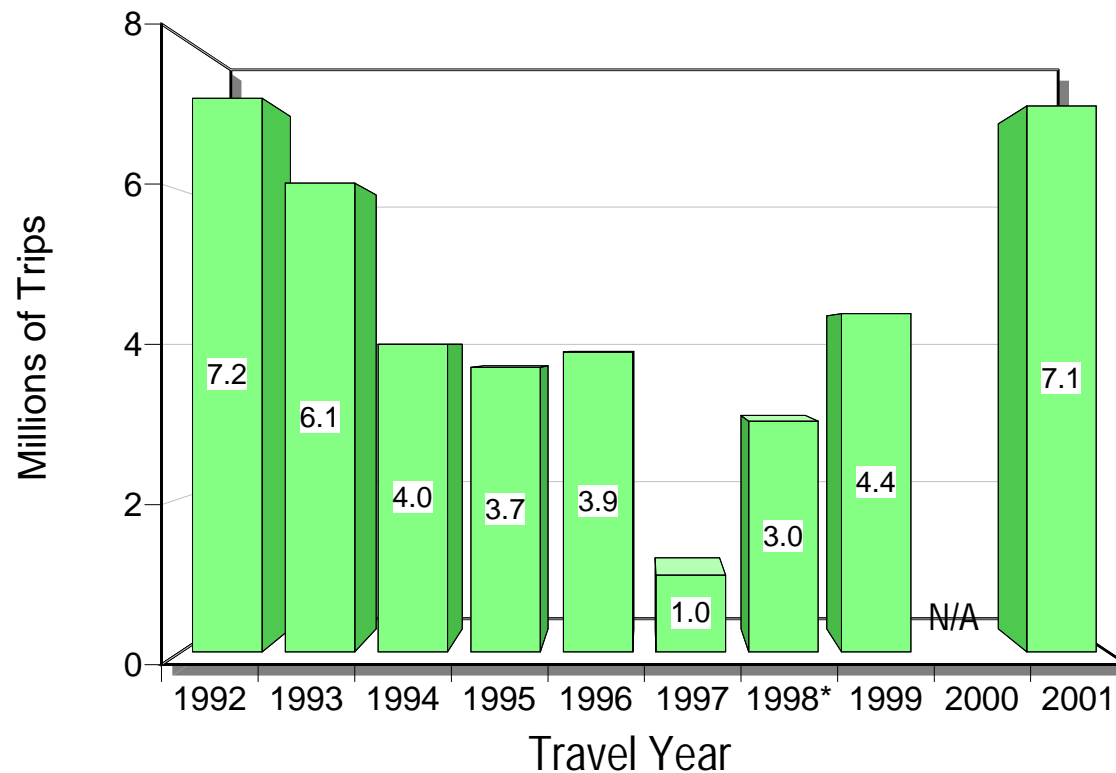
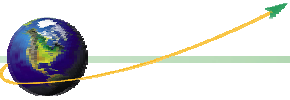
Historical Trends in Advertising Impacts

New Jersey's Advertising Budget



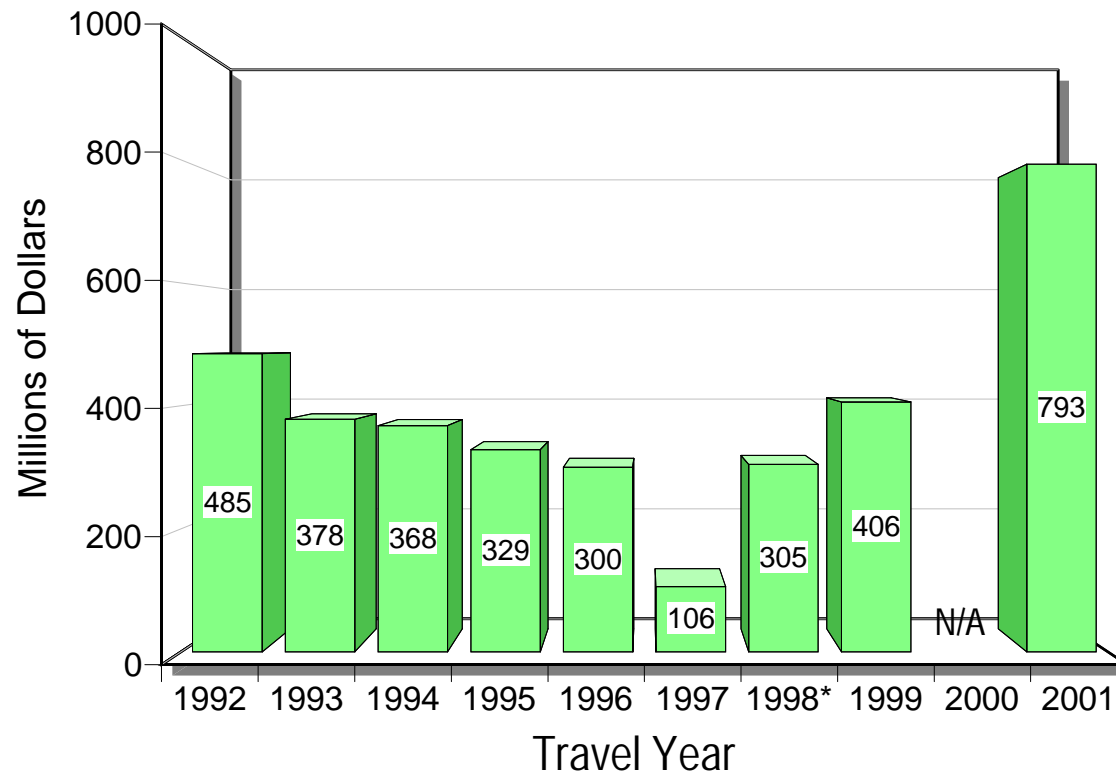
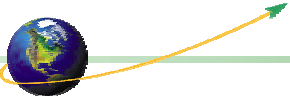
Note: The creative for the 92, 93, and 94 campaigns was similar; to account for likely carry-over impact, the budget figures reported for 93 and 94 are annualized figures based on a two year rolling average; actual budgets were \$1.6 million for 1993 and 1.75 million for 1994.

Trips Generated by Advertising



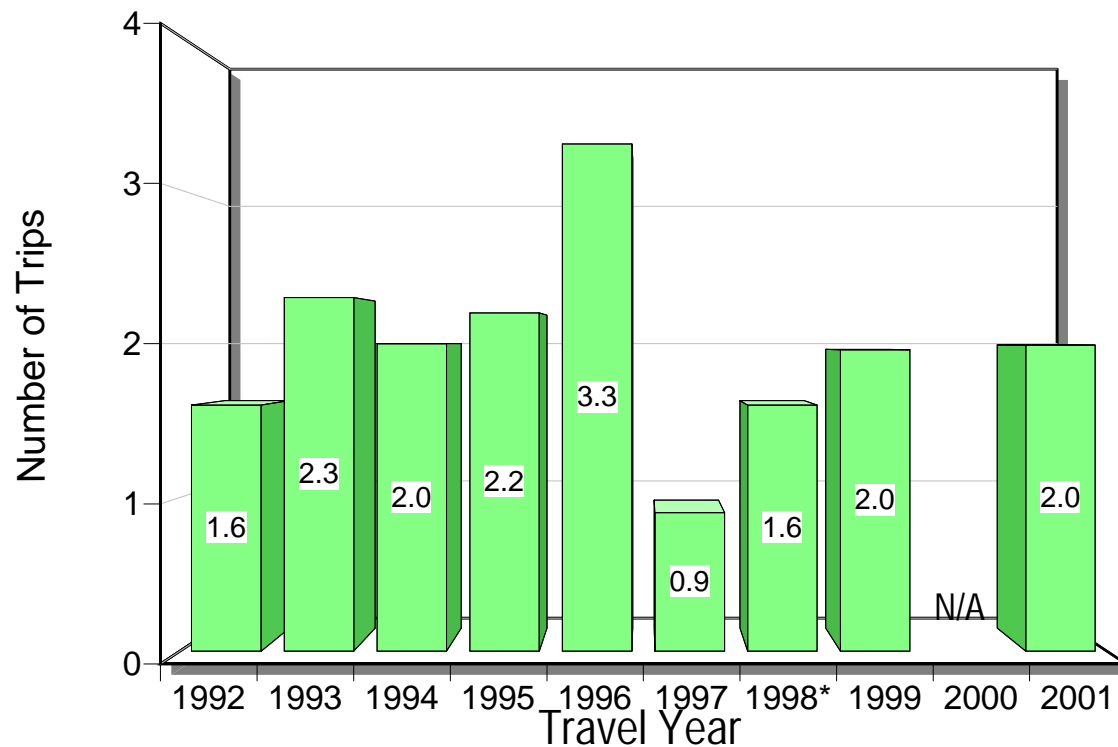
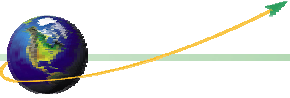
* Estimated trips and expenditures based on historical conversion rate and expenditure data.

Expenditures Generated by Advertising



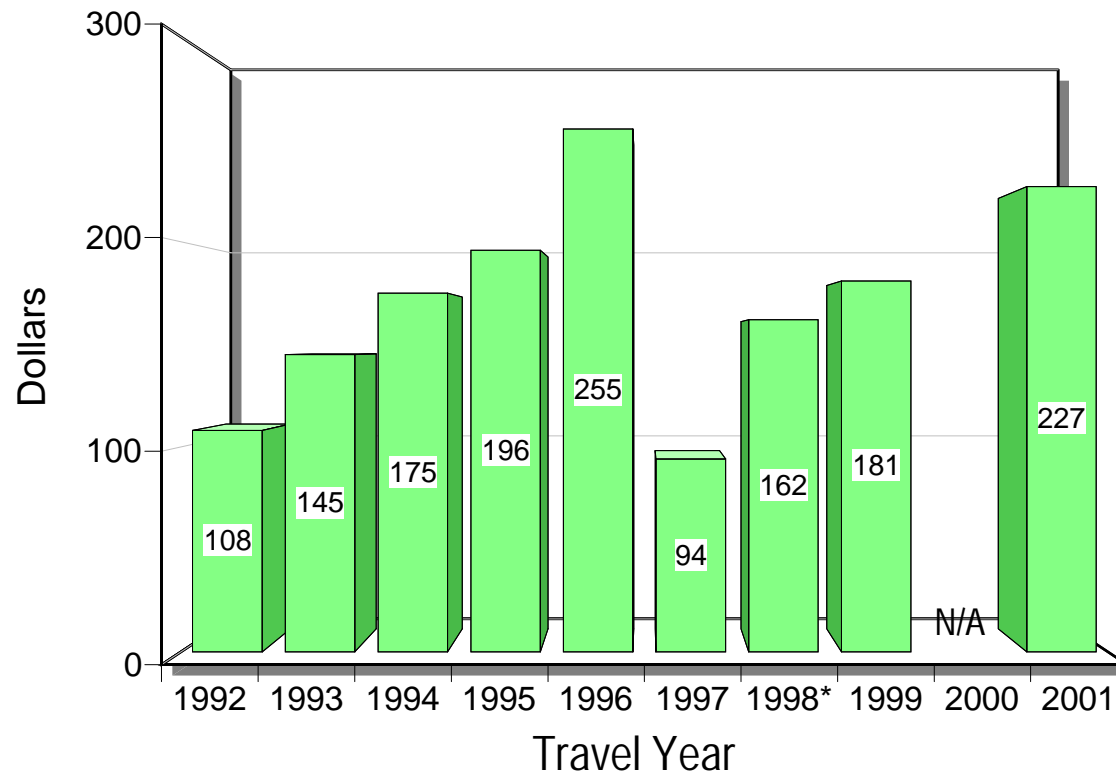
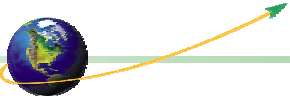
* Estimated trips and expenditures based on historical conversion rate and expenditure data.

Trips Per Dollar Invested in Advertising



* Estimated trips and expenditures based on historical conversion rate and expenditure data.

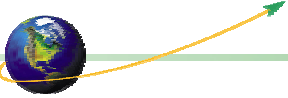
Expenditures Per Dollar Invested in Advertising



* Estimated trips and expenditures based on historical conversion rate and expenditure data.

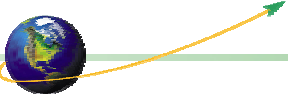
Appendix I: Research Overview

Overview of The Research



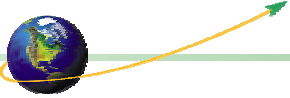
- ◉ Consumer Research
 - ◉ Conducted as part of **TRAVEL USA®** Monitor, Longwoods syndicated travel research program
 - ◉ Respondents are members of a major US consumer mail panel that is balanced to be representative of U.S. households
 - ◉ Use of representative, rather than convenience, samples allows us to project results to all New Jersey travelers
 - ◉ Response rates range from 56% to over 70%, depending on the study
 - ◉ By participating in a syndicated research program, New Jersey obtains comprehensive data far more cost effectively than would otherwise be possible.

Overview of The Research



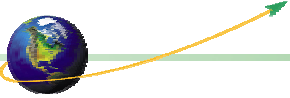
- ◉ Accommodations Inventory
 - ◉ *Conducted by Dr. James Rovelstad of Rovelstad & Associates and Longwoods International*
 - ◉ *Comprehensive survey of the entire New Jersey accommodations industry - including hotels, motels, resorts, campgrounds, and shore cottages.*

Studies Conducted



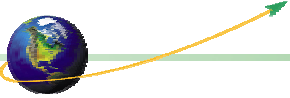
- ◉ **TRAVEL USA® Monitor:** quarterly survey mailed to 50,000 U.S. households; identifies the travel patterns of a randomly selected household member; identified over 2,000 travelers who had taken at least one overnight pleasure or business trip including New Jersey during 2001.
- ◉ **National Travel Monitor:** mailed to 2144 U.S. travelers to provide normative data on the U.S. travel market and trends.
- ◉ **New Jersey Visitor Monitor:** survey mailed to representative sample of 1588 New Jersey visitors identified through **TRAVEL USA® Monitor**; provides detailed data on the New Jersey overnight trip, including trip planning, itinerary and expenditures in New Jersey
- ◉ **New Jersey Day Trip Monitor:** special oversample of 1,200 households in New Jersey itself or within 150 miles of the New Jersey border to obtain a representative sample of New Jersey day trips.

Studies Conducted



- ◉ **New Jersey Accommodations Survey:** complete inventory of all New Jersey accommodations establishments, including hotels, motels, resorts, and campgrounds, as well as agent-rented shore cottages in Atlantic, Cape May, Monmouth, and Ocean Counties.

Image and Accountability Research



- ◉ The program includes annual monitoring of New Jersey's image, travelers' awareness of the state's advertising and impacts of the advertising on travel to New Jersey.
- ◉ The Benchmark survey, mailed to 1,385 recent U.S. travelers, provides data on:
 - ◉ *top of mind awareness of New Jersey as a travel destination*
 - ◉ *detailed image (over 50 image attributes) for New Jersey vs. New York , Pennsylvania, Delaware*
 - ◉ *awareness of New Jersey advertising, based on recognition of samples of New Jersey ads, mailed with the survey*
- ◉ The Conversion survey, mailed to a sample of 228 travelers who indicated they intended to visit New Jersey in last year's Benchmark, provided conversion rates used to estimate the number of trips generated in 2001 by New Jersey's 2000 advertising campaign.

Appendix II: 2001 Surveys